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intercom

THE MAGAZINE OF THE SOCIETY FOR TECHNICAL COMMUNICATION

THE BUSINESS SIDE OF CONTENT

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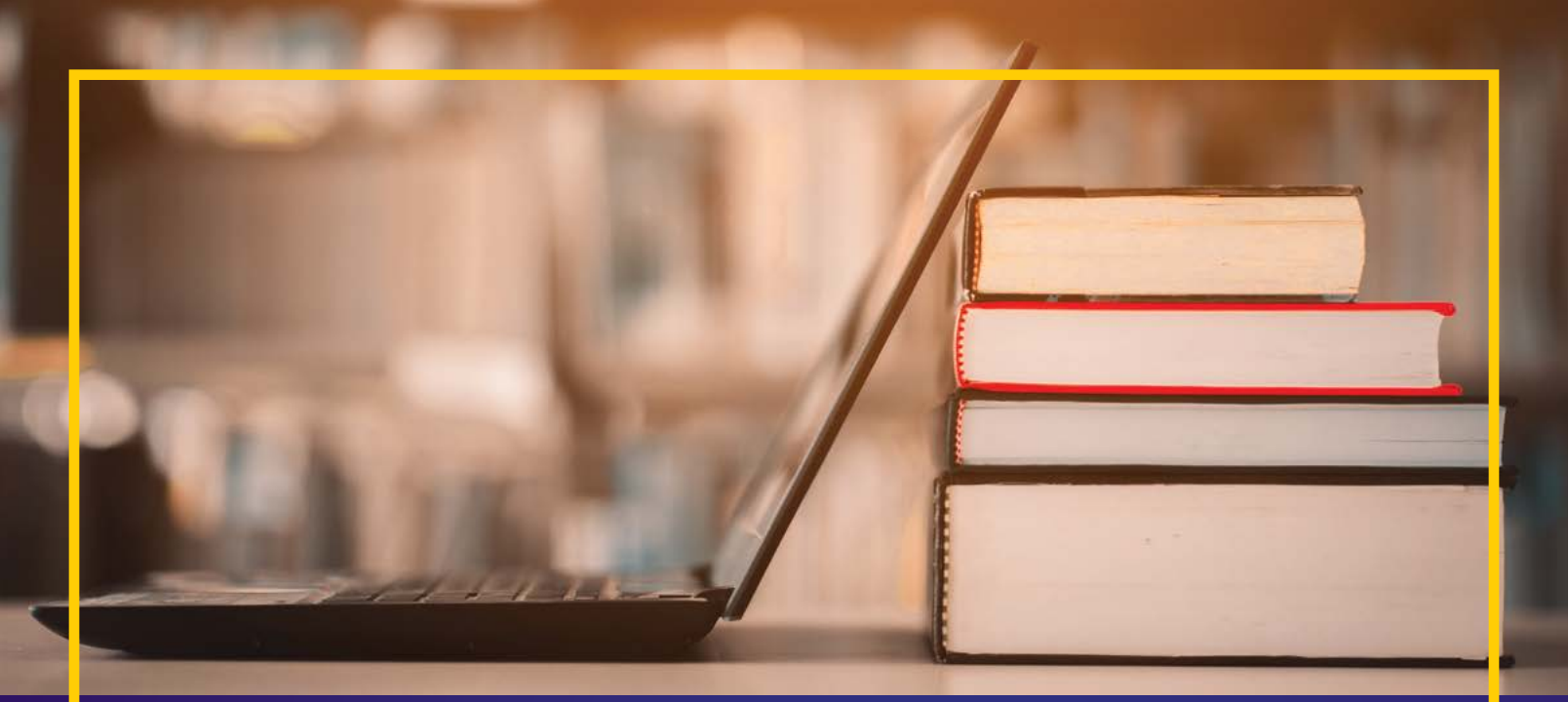

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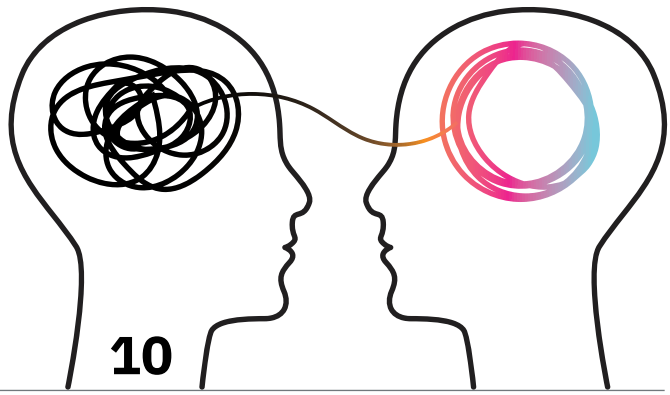

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A Note from the Editor

Demonstrating the business value of content is one of the biggest challenges in communications. While we've always been focused on our customers' needs, we still struggle with addressing the needs of internal stakeholders. How do we speak the financial language of upper management to convey the tangible financial value of content? How do we build strong foundations for content as a competitive differentiator? And how can we support the individual and organizational change needed to be truly valuable to our organizations?

These are the questions addressed in this issue of *Intercom*, guest edited by Andrea Ames. Many of you know Andrea from her time as Executive Editor of *Intercom*, and I'm thrilled to see her return for this issue. She's curated a group of authors who examine the challenges that we face in delivering value for our organizations, both in-house and as external contributors.

I encourage you to reach out to the authors to discuss these ideas; their email addresses are provided in the bios at the end of each article. ■

Alisa Bonsignore
(she/her)

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Guest Editorial

The Business of Content

BY ANDREA L. AMES

We're *all* in the business of content, whether we recognize or acknowledge it, or not. And like any business, we are achieving some level of success — sometimes very little and sometimes a lot. Defining an organization within a larger company as a "business" is akin to discussing reputation: You've got one. The crucial question is, "How consciously are you managing it?"

In fact, our business is quite complex, as we have "customers," such as executive stakeholders, and "partners," like engineering and product management, *inside* of our organizational ecosystem, as well as the external users for whom we create and deliver content.

Building Blocks of Business

Even taking that complexity into consideration, the basic skeleton of all business is the same:

- **Lead generation**: Creating interest in products or services among prospective customers, or "prospects," typically accomplished through marketing activities
- **Conversion**: Turning prospects into customers, typically accomplished through sales activities
- **Delivery**: Building and delivering the products or services that customers have purchased, typically accomplished through product or services development activities

At its core, lead generation is about understanding the needs and desires of a specific market well enough that you know where to find them and, once you find them, how to communicate effectively with them about your products or services. Consider in your content business: Who is your market? What do they need to know, believe, or do to be open to, and interested in, your products or services?

When the market (audience) and their needs and desires are aligned with messaging about products or services, conversion is much more likely to happen. The journey to conversion typically has several stops where prospects get to know, like, and trust us.

After a prospect has paid us and become a customer, we deliver value (hopefully!) to them. If we've designed the product well, to meet the needs of the customer and to live up to the claims we communicated to our prospects, then there should be no surprises, except positive surprises of overdelivering.

Content Team as Business

While we don't often think about our team processes as including marketing and sales, in reality, they do. And again, the crucial question is, "How consciously are you performing these activities?"

We have two key markets that we want to interest in our wares: Our internal stakeholders and our external content consumers. From a marketing standpoint, the internal stakeholders are most important, as they are the gateway to reaching our external consumers with our content.

And when we have achieved the "know, like, and trust" factor with our internal stakeholders, then sales can begin. . .sales of our ideas, for support of our initiatives, and for requests for resources. This process takes time, as it requires that "know, like, and trust" factor, but the rewards of support and resources are worth the effort of building credibility with stakeholders.

For a more in-depth discussion of how to get what your content team needs, watch "Aligning Your Ask" on Coffee and Content: https://www.brighttalk.com/webcast/9273/441642

After we have that coveted support, we can begin to deliver value to our external consumers in the form of success through our content, as well as to our internal stakeholders as the outcomes of that content. . .outcomes that align with business

priorities, such as trial conversions, product adoption, customer retention, and customer advocacy.

To accomplish all of this, we must be on our toes, ready to pivot, as any good business is, and we must be constantly learning and developing capability in areas that ensure success for our content consumers and enable us to operate efficiently and effectively. We must know how we are doing — collecting the right data and measuring the right activities and outcomes to demonstrate the value we are delivering.

As individuals in organizations, we need to acquire and strengthen our business skills to maintain our relevance. As contractors and consultants, we must run our own businesses and contribute to the results of our clients.

There is much to do, friends, and this is your invitation to join me on the journey!

In This Issue

The business of content is a huge topic and can't be covered exhaustively in one *Intercom* issue, but the authors have done an outstanding job of covering some of the most challenging and important issues with practical advice that you can implement right away.

First up, in "Representing Documentation as Revenue Generating," Jenifer Schlotfeldt, senior content strategist and content experience architect for IBM Cloud, provides the keys to showing the revenue-generating impact of documentation.

Next, Melissa Breker, CEO of Breker Group, and I team up in "Coaching Change: When Professional Becomes Personal" to provide advice for approaching change (the only business constant) positively from the human side.

Then Jennifer Fell, CEO of JF Content Solutions, and I tackle a perennial issue of organizational knowledge and learning by leveraging a business model in "The Done-With-You Model for Building Organizational Capability."

Breaking from the organizational view of content business, Jack Molisani, President of ProSpring Technical Staffing, hands you a roadmap to the business skills every technical communicator needs for the most successful career in "Business Skills for Technical Communicators."

Bonnie Denmark, former freelancer and current coordinator for the Business & Technical Writing option at Western Connecticut State University, sheds light on the business side of freelancing in "The Business of Technical Content for Freelancers."

Aleshia Jefferson, a Senior Technical Content Writer at Blue Cross and Blue Shield of Illinois, shares a detailed case study where she puts to work the concepts of telling a content story with data to executives with great success in "Architecting Standard Operating Procedures in SharePoint Online."

And finally, we have a reprint of "The Business Value of Content," a 2020 paper from the STC Roundtable program. In it, we look at the costs of doing business, and how quality content, and in particular the **outcomes** of that content, can improve your organization's bottom line.

The authors have provided their email addresses. I hope you will reach out and engage in discussion with them — I know they look forward to hearing from you and participating in some lively conversations about the business of content. I also hope that you enjoy the issue as much as I enjoyed curating it for you.

Here's to your wild business success! ■

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Representing Documentation as Revenue Generating

By Jenifer Schlotfeldt

High-quality documentation exudes the authority to meet any customer's expectations

In many companies, documentation is an afterthought to delivering a product release. Writing teams often feel underappreciated and are typically viewed as a cost center. It's not because documentation isn't an important part of the customer's pre- and post-sales journey. It's because, as writing teams, we've had difficulty showing documentation's revenue-generating impact.

Here's what I've learned about how to represent documentation's contribution to my business's bottom line, and ultimately, getting non-writers in my company to care more about docs.

Quality Documentation

First, we ensure that we are delivering good, high-quality documentation and can show that our documentation meets customer expectations.

Using tools to automate quality checking can help to make the writing team more efficient, especially in a continuous-delivery environment. Automated tooling can check for things like:

- **Spelling**: Are there any typos?
- **Grammar**: Is the content grammatically correct?
- **Style**: Is it following the company style guidelines?
- **Accessibility**: Is it passing all the accessibility requirements?
- **Broken links**: Are there any broken links to other pages within, or outside, of your documentation?

We also have editors to provide what the quality checkers can't. They give input and guidance on the kind of content we're providing, as well as consistency, organization, and information architecture.

Last, subject matter experts and technical owners check the technical accuracy. We work with them to ensure we're producing documentation that covers the product as it is intended to be used — not just covering the features and how they work.

All of this adds up to the final deliverable and customers letting us know if it meets their expectations. That typically comes in the form of user comments or ratings from tools like feedback surveys.

In our experience, documentation is not a top driver of our Net Promoter Scores® (NPS), but documentation consistently comes up in comments. Good quality documentation earns your customers' trust and sets them up to help themselves at any stage of the journey with your product. This can ultimately be a positive driver for a good NPS.

> **Good quality documentation earns your customers' trust and sets them up to help themselves at any stage of the journey with your product.**

Analyzing Data

Next, we look at user behavior, user data, and detailed user feedback.

User testing documentation — or partnering with the folks leading product user testing — is a good way to understand if the content and format are correct and whether the right functionality is available in the publishing site. While running users through tests, we leverage the opportunity to get input on any content we produce — for example, to understand if user interface text or terminology is working, needs updating, or needs to be added. The best test to run is asking the tester to complete a task by using the documentation.

User research helps to really understand who our users are: novice, technical, and so on. Research can also help discover how users will really be using the product. This research also helps to understand what features, format, or content will delight users the most.

The data collected on user behavior helps to understand:

- How they use the documentation delivery application
- How they use the embedded help system
- How they use the content in combination with the product
- What they access, in what language, and on what kind of device

When looking at what the industry is doing, ask:

- What term is the industry using?
- How is similar content being delivered?
- What's a standard?
- What features in the documentation delivery application could be helpful to my users?

Sometimes you can take action on user comments, and you know exactly what to fix — typos, missing content, or incorrect steps.

At other times, the comments aren't actionable, but data can help to identify the real issue. Ask:

- Do we see a lot of issues with the content quality?
- Do we see other comments that provide more actionable feedback?
- What does the user testing say?

Most customer-facing team members hear first-hand when a user is unhappy with the product, especially if they can't find any documentation to understand a feature.

All this data provides insights that can be shared with other areas of the business. It shows the impact that documentation has in the customer journey, whether that is how and when they are using the documentation, or how important the documentation is to them.

That's not the data, however, that *really* shows documentation's impact on revenue. You might also think that page views are the only metrics you can gather about your documentation. But we have lots of metrics available to us, including being able to see how our content impacts account creation and rated usage.

Showing that documentation is part of the marketing and sales funnel that ends with account creation, money spent, or some other conversion metric makes clear the importance of documentation to your customers.

Non-Writer Participation

Spend time with other areas of the business to get additional insights about how well the documentation meets customer needs. Most customer-facing team members hear first-hand when a user is unhappy with the product, especially if they can't find any documentation to understand a feature. Not only does this input provide more insight into the quality, accuracy, and use of your documentation, but it also creates connections with others who can contribute and participate in creating the right documentation for users.

Building these relationships begins to pave the way for a corporate culture shift around the importance of documentation. It provides an opportunity to show that there is an easy path to collaboration and to get the right documentation published. It also provides more data.

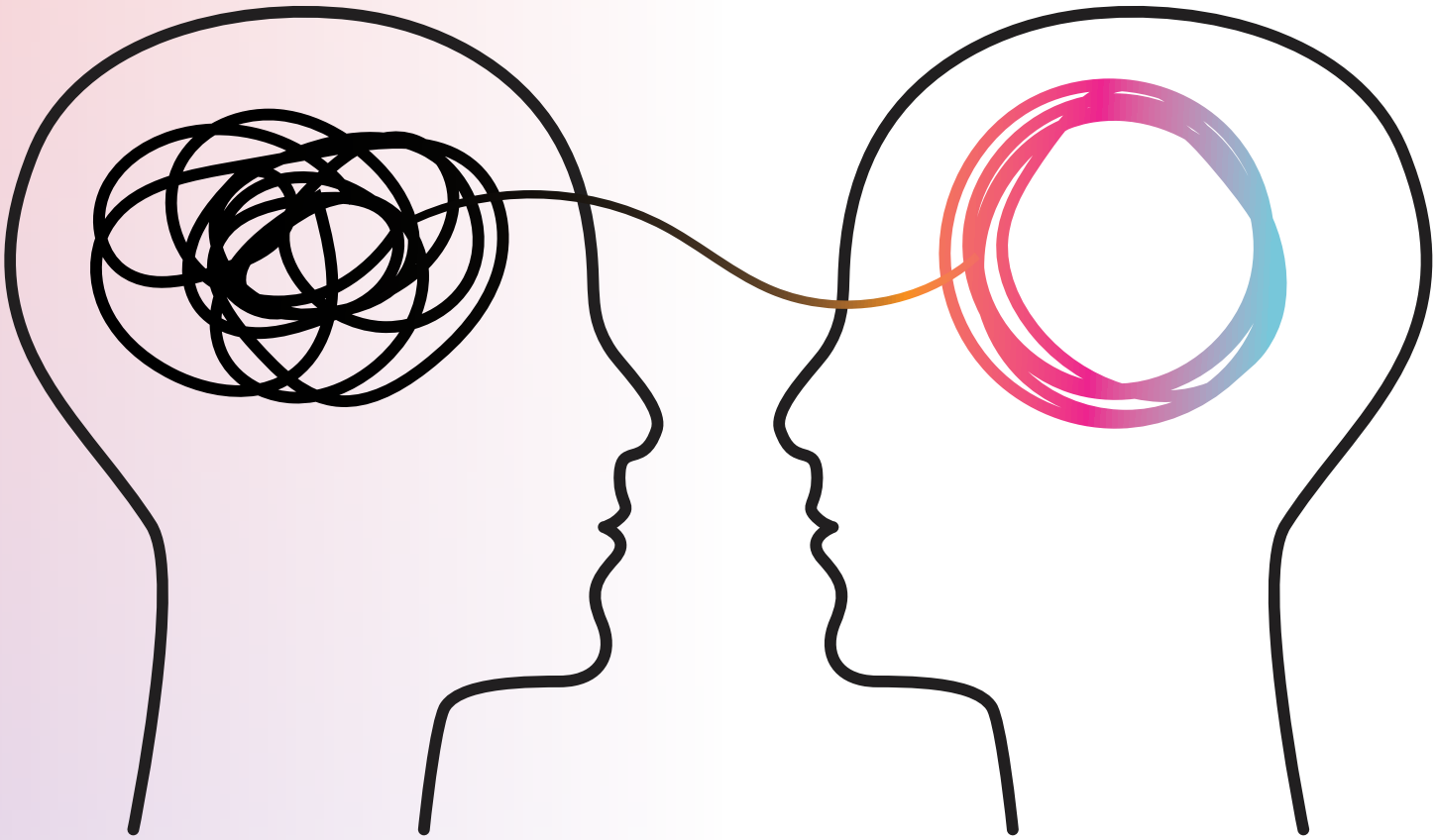
At the end of the day, money talks. Understanding what data you have access to and how to connect documentation to purchases can be the best ways to prove how much documentation impacts revenue. ■

JENIFER SCHLOTFELDT (jschlot@us.ibm.com) is a senior content strategist and the content experience architect for IBM Cloud. Jenifer leads a team of software engineers and content designers who own the IBM Cloud Content Experience. Not only is the team supporting the continuous delivery of the IBM Cloud Docs and API Docs, but they also embrace DevOps and Design Thinking practices. She is also the coauthor of *DITA Best Practices: A Roadmap for Writing, Editing, and Architecting in DITA.*

Coaching Change: When Professional Becomes Personal

By Melissa Breker and Andrea L. Ames | STC Fellow

Positive approaches to changes at work that take the whole person into account



Business is change. Business survival requires that we experiment, fail, learn, course-correct, and pivot our way to success. For a content team to operate like a content *business*, the members must be flexible, tolerant of ambiguity, and must constantly adjust, evolve, transform, and adapt. In other words, change.

Change. Is. Hard. Ask anyone who has tried to break or start a habit — *even when they desperately want to*. Why is it so hard? Because the human brain is wired to *resist* change. Our amygdala — the part of our brain that controls our "fight, flight, freeze, or fawn" response[1] — detects a threat when it senses change and responds by attempting to protect us from that change, creating resistance. And that typically unconscious resistance, in all its many forms, is one of the biggest challenges to change, both personal and organizational. It often significantly influences organizational change efforts away from success, requiring a personal approach to traditional change management processes.

Managing Change

Change management is most often misunderstood to be a systematic process applied to an organization that needs to move itself and its constituent parts, including people, from point A (a beginning state) to point B (an end state). If you Google "change management," you will see 5,920,000,000 search results (give or take a few million) that range from models, principles, steps, and key performance indicators (KPI) to skills, training, and certification programs. With all of the advice and training out there, managing change should be easy, right? Just apply change-management model A to organization change project B and achieve change C, right? As it turns out, not so much.

As consultants, we (Melissa and Andrea) transact business using the currency of change. We might be engaged to help a client who recognizes that they are engaging in a big change that must be intentionally led (a term we prefer more than

"managed"). Or a client might not readily see a small, but needed, change in thinking. Big or small, all change requires planning and strategic prioritizing, regardless of the size of the initiative.

Every consulting, training, and facilitation engagement that we have taken on has been an exercise in change, whether the client recognized it initially, or not. In fact, even in our corporate lives, every project had some element of change. And in every change initiative, success was entirely dependent on the humans who were a part of that change — from the instigators to the unwilling. Every single one; no exceptions. Why? Because organizations don't change; people do.

If people are the entities that are changing, not organizations, then managing change is *not just* about models, principles, steps, KPIs, and skills. Managing change is *not just* about moving from point A to point B. It's *not just* about installing a new technology or implementing a new work process.

Central to change management is leading and coaching people.[2,3]

Coaching

Coaching is another misunderstood practice, especially due to different kinds of coaches resulting in an overloaded definition. The International Coaching Federation (ICF)[4] is a global organization dedicated to advancing the coaching profession by setting high standards, providing independent certification, and building a worldwide network of trained coaching professionals. Professional coaching, according to the ICF, is partnering with clients in a thought-provoking, creative process that inspires them to maximize their potential, improve their outlook on work and life, improve their leadership skills, and unlock their potential.

In fact, even in our corporate lives, every project had some element of change. And in every change initiative, success was entirely dependent on the humans who were a part of that change — from the instigators to the unwilling. Every single one; no exceptions. Why? Because organizations don't change; people do.

Professional coaching focuses on setting goals, creating outcomes, and identifying opportunities for development based on individual strengths and capabilities, not on behaviors that are being executed poorly or incorrectly.[5,6]

It is *not:*

- Therapy
- Consulting
- Mentoring
- Training
- Athletic development (i.e., sports coaching)

If you read "maximize," "improve," "setting goals," "creating outcomes," and "opportunities for development," and thought, "That's *change!*" you're not alone. The benefits and outcomes of professional coaching are typically about making changes — for individuals, for teams, and thus for organizations.

And in our experience, coaching — along with a people-focused change management approach — is what ensures success in change initiatives, allowing for, and working with, our brain-based resistance to that change.[7,8]

"Dammit, Jim! I'm a Doctor, Not an Engineer!"

You might be thinking, "Clever *Star Trek* quote, Melissa and Andrea, but I'm a tech writer, not a professional coach, nor a change expert!" Well, you're in luck! You don't *have* to be a professional coach *or* a change expert to successfully accomplish change in yourself or to inspire and support change in your organization. You can arm yourself with some knowledge, open up to a bit of personal growth, and lead *yourself* well through the change. . .and show up as an example of the way organizational change happens, one person at a time.

A Change Management Toolbox

A focus on two aspects of change will give you, as an individual, the most value for the time you will spend learning:

- Individual change
- Positive change

Change management is a big topic, and we are covering just two dimensions here, so be sure to check out all of the change management resources we provided.

Individual Change

We love and use Prosci's[9,10] ADKAR Model[11] to lead individuals through change, and we recommend checking it out.[12] It's a deceptively simple and incredibly powerful model, developed by Jeff Hiatt[13,14] (Prosci's founder) and based on 700+ organizations' change patterns.

ADKAR (Figure 1) is an acronym that stands for the five outcomes that each person who is impacted by the change in some way must achieve for the change initiative to succeed:

- **A**wareness of the need for change
- **D**esire to participate and support the change (i.e., what's in it for me?)
- **K**nowledge of how to change
- **A**bility to implement the desired skills and behaviors it will take to make the change and to act in the post-change environment
- **R**einforcement to sustain the change

There is, of course, the "project" side of the change process, and it's useful to understand that process, as well. Given that the most likely reason for failure in a change initiative, however, is the human component — and because, if you are an individual contributor, you really only have control over yourself and your actions — we recommend that you pay most attention to ADKAR's focus on individual change. And we've provided several people-focused change management resources — from books and articles, to training courses — to facilitate that.

Positive Change

On the "project" side of the change-management process, positive-change approaches dovetail nicely with a focus on individual change and within a people-focused change management

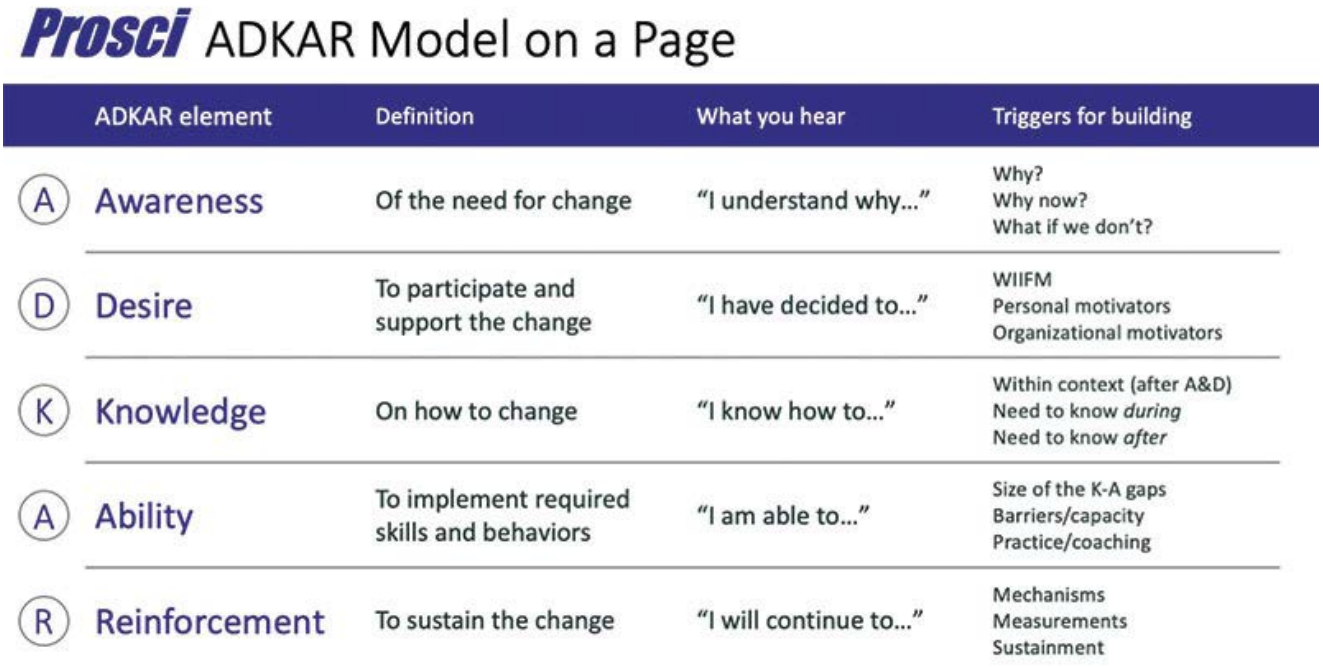


Figure 1. The ADKAR Model©, Prosci.

process. The embodiment of positive change processes is Appreciative Inquiry.[15]

Appreciative Inquiry (AI) focuses on the strengths, rather than the weaknesses, of people, their organizations, and the world around them that is relevant to the organizational change taking place. XCHANGE has developed a framework (Figure 2), based on Appreciative Inquiry, that is very successful and engaging to implement. Called the XCHANGE 5I Framework,[16] it includes five components:

- **Initiate**: Identify what to accomplish, including stakeholders, outcomes, and why.
- **Identify**: Identify when we are at our best; appreciate the past and uncover shared strengths, purpose, and values.
- **Imagine**: Imagine what could be; co-create future visions and identify opportunity areas.
- **Innovate**: Determine how we might create our future; ideate, prototype, and iterate solutions (typically, a Design Thinking workshop).
- **Implement**: Determine what's next, including prioritizing, planning, and accountability.

A Self-Coaching Toolbox

"Coaching" yourself is really a matter of exercising control over your mindset, keeping yourself open to change, and being particularly mindful of the resistance to change that will crop up during any and all of the ADKAR phases. There are many aspects to this, and the two that are most likely to hold you back from change are:

- Negative self-talk and limiting beliefs
- Asking the wrong questions

We have space to provide only a surface treatment of these, so be sure to check out all of the coaching and mindset resources we provided.

Negative Self-Talk and Limiting Beliefs

The heavy lifting in mindset control is not allowing the voice and behavior of resistance and other limiting beliefs take over. Unfortunately, those are typically so ingrained in our day-to-day life that they are indistinguishable from who we believe we are. It takes some challenging self-reflection to begin to "hear" that voice as an "optional" component of who we are.

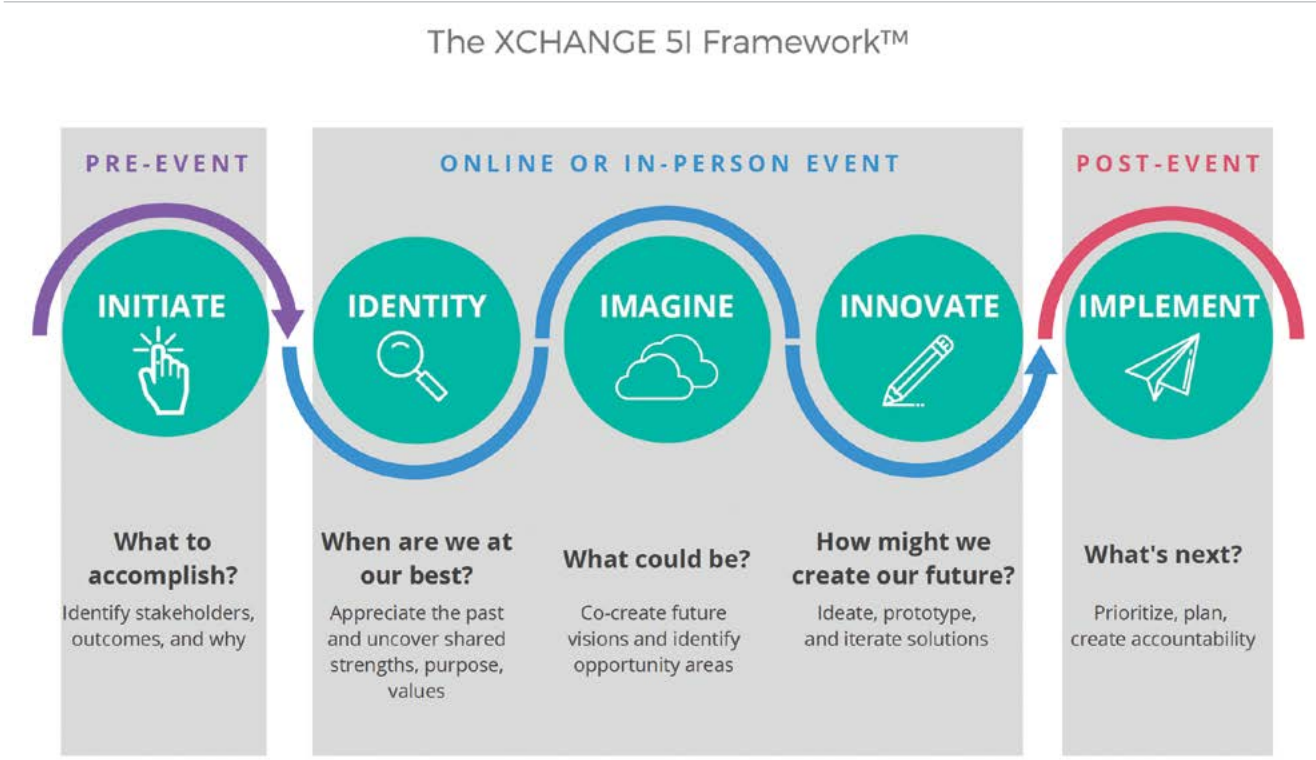


Figure 2. The XCHANGE 5I Framework, based on Appreciative Inquiry, is used to help organizations guide positive change.

Brooke Castillo's model for coaching yourself (called "The Self Coaching Model" or simply, "The Model") is a simple and pragmatic way of addressing the thoughts and feelings that are likely to come up as you begin to uncover your negative self-talk and limiting beliefs. The bottom line is that you can control your thoughts and emotions, and The Model provides you with the structure and thought process to do that.[17-19]

Asking the Right Questions

Did you know that questions hijack your brain?[20] In a good way! It doesn't matter if someone else asks you a question or if you ask yourself a question, that question will take over your brain's process in a mental reflex called "instinctive elaboration," and it won't be able to think about anything else until the question is answered. And questions can build human connection and help you become more influential, as well.[21,22]

In this context of self-coaching, however, the most important aspect of this is asking the *right* questions. What are the right questions?[23] For starters, they are questions that move you toward thinking about a positive outcome vs. catching you in a rabbit-hole of unproductive flailing or self-flagellation.

Consider these two questions:

Question 1: Why can't I get this right?

Question 2: What works?

While this is a simple example, if you're like most people, you *do* ask yourself questions like Question 1 — possibly a lot . . . possibly *all day long*. Is the answer to *that* question going to be useful to you in some way? If your brain is hijacked by instinctive elaboration on *that* question, what is the result? If you got an answer to Question 2, you could use the resulting information to make progress toward a future positive outcome.

These are subtle, unconscious, and deeply ingrained question patterns that most of us have running on the hamster wheel of thought in our heads all the time. Bringing your attention to the concept of asking the right questions and catching these unproductive questions to reframe or disrupt your instinctive elaboration with a more productive question, can begin to derail the wrong questions.

Getting More Help

In the end, here is what we know to be true:

- Change is ubiquitous, dependent on humans, and hard.
- Humans biologically resist change, and success requires addressing that resistance.
- People-focused, positive change management, paired with professional coaching, has the best chance of ensuring that change takes place.

As a content *team*, you might have an important change initiative coming up and need more help. As a content *business*, you should have at least rudimentary change skills in your toolbox and feel confident taking on most typical change.

If you need help with a current project, use that opportunity to build your skills for next time. Hire a change management consultant and coach who will teach you and provide frameworks that you can learn and apply after the current project ends. Identify a strategic individual contributor to "apprentice" with the consultant, and write that relationship into your contract. You will be glad that you contributed to the transformation of your team to a thriving content business! ■

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The Done-With-You Model for Building Organizational Capability

By Jennifer Fell and Andrea L. Ames | STC Fellow

Flipping the done-for-you model of business on its head

With nearly 70 combined years in the technical content industry, we've seen many approaches to the "business" of content. . .approaches that range from order-taking (à la Starbucks barista) to bringing on armies of contractors in times of crisis (attempting to thwart the *Mythical Man-Month*) to well-meaning attempts at collaboration and empowerment (often resulting in death by a thousand committees).

We've seen just as many different forms of sharing and building knowledge, learning, and skill building, including (but certainly not limited to) agile guilds and chapters, internal conferences and workshops, work time set aside specifically for professional development, and training budgets for attending external classes.

As we pursue content business utopia, we consider the many models of business that we scrutinize for running our own consulting

organizations. As a result, we've found many interesting and viable parallels that can bring a content team well into the realm of a "business" within the larger organization, as well as business models that can apply to *pieces* of a business, such as building organizational capability.

The Many Faces of Capability Building

Many popular approaches for successfully managing business functions can apply to managing team capabilities. Here are a few examples (not an exhaustive list):

- **Systems and standard operating procedures (SOPs)**[1,2]: As instructional content professionals, we understand the value of a good, well-documented procedure! This internal "documentation" for a business's operational processes is fundamental to growing and scaling.

  SOPs can also function as an effective knowledge repository. That repository can be unwieldy, however, when there are many SOPs, requiring a significant time investment to document and test for accuracy, and additional time to consume and understand. Some activities — in particular, those that require significant analysis and strategy development for complex systems — are best communicated in ways other than written documentation.

- **Redundant systems, such as cross-training and assigning backups to activities**: This is not "redundancy" of the "layoff" type. This is planning for expected or unexpected gaps or "failures" in the activities with backups. Cross-training team members and ensuring that critical members have backups when they are away is good common sense.

  Redundant knowledge and skills across multiple team members can also function as a human knowledge repository. It's best when the human repository has a document repository, as well. And it works until it doesn't, such as when a backup leaves their project, role, team, or the company.

- **Various forms of collaboration, such as pairing and apprenticing**: Small businesses (and teams) typically feel the cost of pairing (two employees performing a single activity together, such as in pair programming[3]) to be prohibitive, but there are benefits to be exploited from significant collaboration in an activity. Apprenticing is a time-honored way to bring a learner to a new level of skill by leveraging an existing expert.[4]

  Collaboration is not only an imperative in the current workplace; it is also an extremely valuable way to build organizational capability. We have had remarkable success with the Idyll Point™ Content Leaders That Deliver™ Mastery Model of apprenticeship (Figure 1), but we found it difficult for content professionals to accept the idea that they might be an apprentice working under an expert.

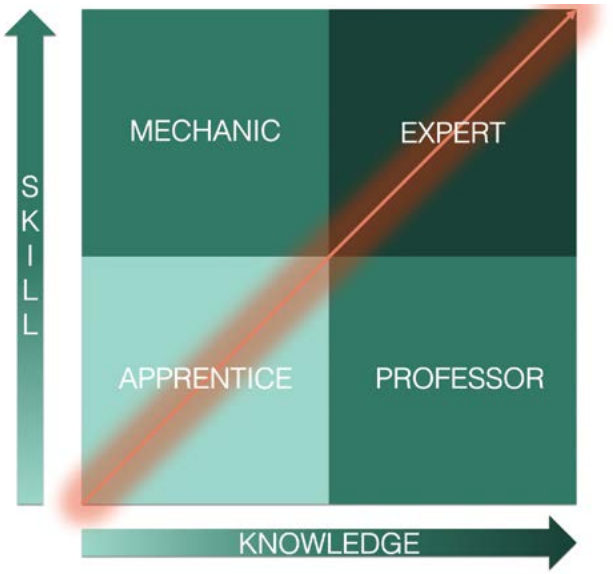

Figure 1. The Idyll Point™ Content Leaders That Deliver™ Mastery Model, an apprenticeship approach to building organizational capability.

Enter the Done-With-You Model

Services businesses historically have had a done-for-you business model. You hire them. They do the agreed-to work. You pay them. End of story. That works fine for some types of work, and not so well for others.

The work that Idyll Point™ Group does, for example, of consulting, facilitating, training,

mentoring, and coaching content teams to operate as businesses within their organizations doesn't fit the done-**for**-you model. Trying to do that work *for* our clients would be like going to the gym for someone else — you work out, and they get the fitness. It doesn't really work that way.

We've also found that information architecture and content strategy work — with deep roots in analysis, complex systems, and strategy — is best learned through experience. Again, experience isn't something you can *do* for someone else.

The done-**with**-you business model is a much better fit for this type of work. In a services business context, you hire them and agree to a mode of work that includes collaboration, training, and mentoring. Knowledge transfer is a key deliverable of the agreement. When the experience and work is over, you pay them. But it's not the end of the story. And the more savvy you are, as a client, about taking advantage of this type of engagement, the longer, more far-reaching, and ultimately more valuable the impact of that experience will be.

SODOTO

The "see one, do one, teach one" approach is a paradigm popularized by William Halsted, an early 20th century surgeon. While it seems to us (non-surgeons though we are) incautious to perform a surgery after seeing it done only once — or to teach someone else to perform one after doing it only once — as a general model, it's got value for teaching other, not-life-threatening pursuits. The done-with-you model for building organizational capability leverages this concept to transfer knowledge.

For example, imagine a team that wants a content strategy and wants to build more capability on the team for that. They identify an expert (either internal or external) and a learner. The expert begins the relationship doing most of the work and ends the project in a purely support and advisory role. The learner starts off learning by watching, increasing their performance of the activity over time, and ends the project as the primary owner of the strategy, responsible for its maintenance.

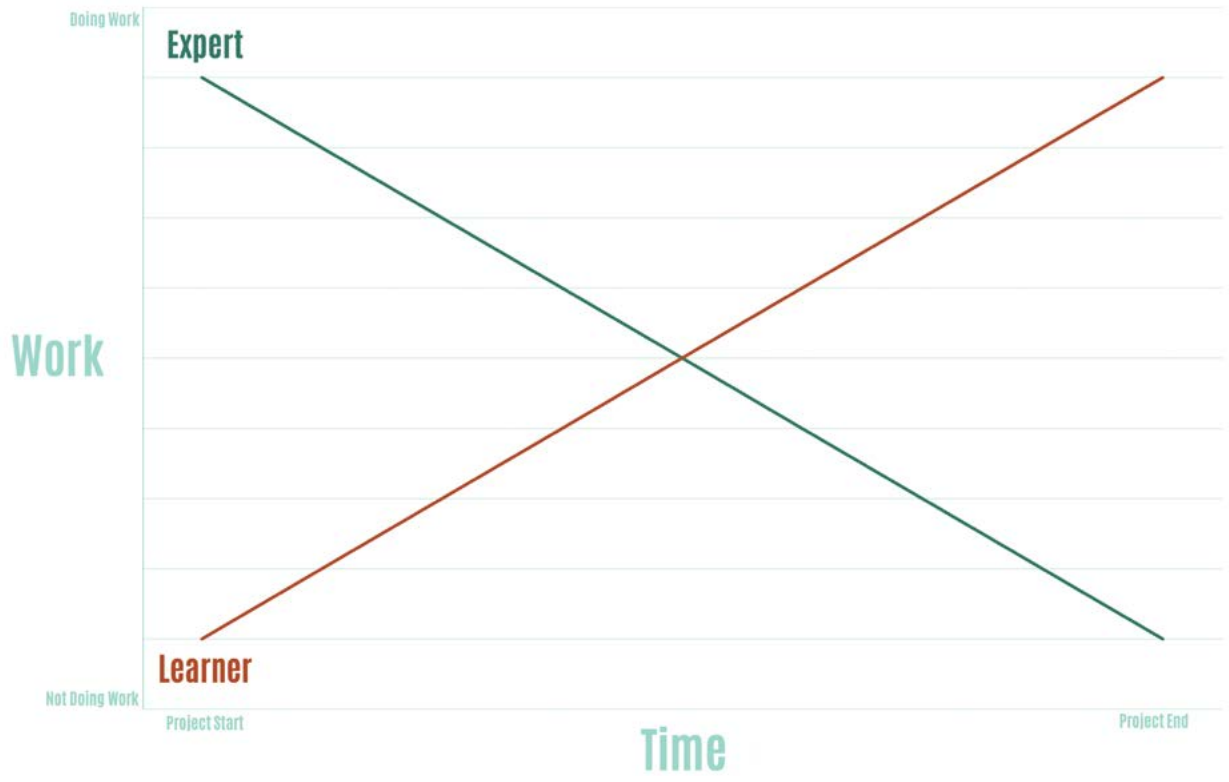

Figure 2. As the work progresses, the expert moves from doing the work to supporting and advising the learner on the work, and the learner moves from learning by watching the work to doing the work.

Over time, knowledge is transferred, *and* the learner gains experience with support from the expert (Figure 2). A relationship is built that the learner can leverage in the future, if unfamiliar situations arise. The team has doubled its experienced strategic staff — or created capability where none existed before if the expert was brought in from outside the organization.

Making Done-With-You Mentoring Work

There are some critical elements of the done-with-you mentoring approach that ensure its success. Here is the benefit of *our* experiential learning with tips that are especially important if this is your first time working in a model like this.

- **Know what you want**: It's crucial that everyone involved is clear on the capability you want to build. As with any work, you will get what you ask for, so be sure it is what you want.
- **Create a clear agreement for who does what and when**: Even if the expert and the learner are on the same team, an agreement will ensure that both participants in the work are clear. It doesn't need to be super-formal, but it does need to be detailed enough that both parties can demonstrate their understanding. We recommend co-creating this with everyone involved.
- **Ensure outcomes and success factors are well understood**: What are the participants being measured on? What is the expected output? How will you know if the work is successful?
- **Be experimental and curious**: If this is your first time trying the model, you can take some of the pressure off the work by encouraging a risk-taking and experimental attitude among sponsors and participants.
- **Check in regularly and frequently**: Issues in the relationship can be fatal to an initiative like this. Challenges can be uncovered, aired, and resolved more easily if you catch and address them early.
- **Find a real expert**: Ensure that they've done this work and can take your team to the next level.
- **Ensure your expert is a good mentor**: It might not be possible to find an internal expert who is already a good mentor or coach. To ensure success, it's worth the time and effort to get your expert some training in this area.
- **Ensure your learner is coachable**: No matter how senior the learner is, there is always room for growth. Even executives have coaches! A great learner has great potential to consume, grasp, and apply the knowledge *and* is open to the coaching and mentoring being offered by the expert. This is especially important if the knowledge involves "soft skills."

With clarity, an open and coachable learner, an expert mentor, and the space to take risks and experiment, there's a great chance that your first foray into done-with-you capability building will be successful — and will not be your last!

If you're in a large organization, you might be able to find it on another team . . . Marketing content teams often have great strategy resources, and learning content teams often have great architecture resources, due to the modular nature of training content. Leverage all of your company's resources where you can!

When You Need More Help

At the end of the day, for most teams, finding an expert is the hardest part of this approach. If you're trying to build some specific capability on your team, it's often the case that you don't have any of it.

If you're in a large organization, you might be able to find it on another team. Don't discount other content teams, even if they are not focused on technical content. Marketing content teams often have great strategy resources, and learning content teams often have great architecture resources, due to the modular nature of training

content. Leverage all of your company's resources where you can!

When you need outside help, don't let the perceived cost negate the investment you are making in your team's capabilities. Be smart. Ensure the agreement is written such that the external resource must deliver on knowledge transfer. Be sure to pick a team member to work with the external expert who not only has the potential as a learner, but also has potential as a mentor and can be the new expert on your team. Set up the dominoes so that the legacy of that investment is "generations" of learning!

Remember: A great external expert has knowledge and experiences that can guide your team on the straightest path to success *and* build capability during the done-with-you project. The time and effort someone on your team might spend trying to muddle through it could cost you far more in time, effort, frustration, and relationships in the end. ■

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Business Skills for Technical Communicators

By Jack Molisani | STC Fellow

Excel in your next position

As a professional recruiter who specializes in filling technical communication positions, it's disheartening to see candidates miss opportunities because they didn't have the "business skills" needed to excel in a new and challenging position.

But fear not! These skills are absolutely learnable.

Show Me the Money!

The first key to building your business repertoire is to take a class in business accounting. [Cue record scratch sound effect!] Accounting? (You didn't see that one coming, did you?)

It is a safe assumption to say many technical communicators don't truly understand that management's job is to decrease costs and increase revenue and market share, and therefore those technical communicators can't effectively communicate how they add to their organization's bottom line.

A case in point: You've probably heard the term "bottom line" a thousand times. But do you really understand what it means? In business accounting, net income is an organization's income minus cost of goods sold, expenses, and taxes for an accounting period. Net income is informally called "the bottom line," because it is

typically found on the last line of a company's profit and loss (P&L) statement.

By learning to speak "CFO" (Chief Financial Officer), you can better communicate the value you bring to an organization, which helps when you want to ask for a raise or for resources. (More about this later when we discuss how to build a business case.)

Whose Line is it Anyway?

My next recommendation for adding to your business skills toolkit is to take a class in improv comedy.[1] Improvised comedy is when a cast makes up scenes on the spot based on audience suggestions, much like the U.K. and U.S. television show, *Whose Line Is It Anyway?*

I'd been going to a local improv group for years, and when they invited me to take their Introduction to Improv class I jumped at the chance. As expected, I had a blast! What I didn't expect is that it would add to my workplace business skills. I learned to be "in the moment" and not be thrown off by questions I wasn't expecting — or by co-worker's comments or ideas that I didn't agree with.

Just as a tennis player learns to return a ball lobbed over a net, in improv, you learn to return any communication thrown at you — calmly and effectively.

> **By learning to speak "CFO" (Chief Financial Officer), you can better communicate the value you bring to an organization**

Propose a Toast

The next suggestion for taking your business skills to the next level is to take classes in public speaking and conflict resolution.

Toastmasters International[2] is a very safe and supportive place to learn and practice public speaking. At some point in your career, you will need to make a presentation to your boss, your peers, or management — not to mention speaking at conferences to position yourself as an expert and to become more visible in the industry. Better to learn improv and public speaking long before you need those skills. Luck favors the prepared!

How often do we, as technical communicators, receive conflicting edits from subject matter experts (SME)? Or perhaps the SMEs don't return review comments at all? How do you achieve influence without authority?

Whenever I go on an interview (or in my current job, a sales call) and the interviewer says, "So tell me about you," I always reply with, "Sure, but first tell me what you are looking for, so I'll have a context in which to answer your questions." (Inevitably what they need is nothing like what is listed in the job description.)

Once, the interviewer replied, "Diplomacy skills." [Cue Scooby-Doo sound effect of "Huh?"] Apparently, that organization employed a cadre of brilliant but vain PhDs, each of whom thought they were the best and their answer was the one and only correct input. They really needed someone who had diplomacy skills and conflict-resolution skills to get the information needed without "ruffling SME feathers."

You Don't Get What You Deserve — You Get What You Negotiate

To round out your business skills toolbox, hone your workplace negotiation and debate skills. (Yes, debate! Never joined the Debate Club in high school? It's never too late!)

For many people, the term "negotiating" brings to mind unpleasant haggling with a car salesperson. But negotiating isn't something you do only when buying a large-ticket item, like a car. Deciding what features will be documented given the time available, getting your kids to clean their rooms before playing video games, even deciding what movie to watch on date night — all of these involve negotiating in one form or another.[3]

Webster's Dictionary defines negotiating as: "Conferring, discussing, or bargaining to reach agreement." As a technical communicator, you do that all the time!

Next, let's look at the derivation. Negotiating derives from the Latin *negotiatus,* past participle of *negotiari*, "carry on business, do business."

So negotiation is just part and parcel of doing business!

Interesting, huh?

Negotiating derives from the Latin *negotiatus*, past participle of *negotiari,* "carry on business, do business." So negotiation is just part and parcel of doing business!

Build a Business Case

When it is time to negotiate for something, the most effective way to get what you want is to build a business case for it.[4] In your business case:

- State the problem
- Offer a solution (or multiple solutions)
- State how much it will cost to implement the solution(s)
- Estimate the return on investment (or cost avoidance) that could be realized by taking action
- State the risk of lost income or cost increase if no action is taken

Be sure to state the problem in terms of dollars and cents. For example: The problem is not "We need a content management system." The problem is "We're spending $10,000 a quarter more than we need to on translation costs."

Illustrate how the situation is a problem for the company, not just for you!

By finding ways to decrease costs and increase profits, you show you add to the company's bottom line — which, by the way, is a business case for asking for a raise come review time, right?

Bringing It All Together

Your mission, should you choose to accept it (yes, it's another 1970s pop culture reference), is to gain the skills you need to handle any business situation with calm professionalism, to achieve influence without authority over those who you need to take action, and to build business cases so convincingly written that you receive all the raises and resources you need to advance your tech comm career.

Remember: These are all learnable skills. Really!

Ready to start?

Start! ■

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The Business of Technical Content for Freelancers

By Bonnie Denmark | STC Member

Tips to gain a competitive edge

Technical content is big business and only expected to grow, thanks in part to the boom in digital products and new ways of working sparked by the pandemic. As companies struggle to keep up with content demands, opportunities for technical communication freelancers are on the rise.

Hayden Brown, CEO of UpWork, the world's largest freelance marketplace, doesn't see a return to the old ways of working. In an August 2021 *New York Times* interview, she noted that younger generations in particular have a more "empowered idea around how they're going to build their careers that's much more autonomous and not related to a single firm."[1]

But with increased opportunity comes more pressure to stand out from the crowd. It pays to be strategic, so here are some tips that can help you position yourself as a freelancer to be more attractive to potential hirers.

Make Your Online Profile Count

The starting line for many is a profile on a freelancer website. Some sites truncate bios after the first 100 or so characters, so use your space wisely to invite potential hirers to read on. Frontload the most relevant information, as in "Health and medical writer who turns tough medical text into readable, user-friendly language" or "B2B/B2C content: documentation, user guides, and web content for apps/software; troubleshooting; marketing."

A not-so-good use of your small window to impress is, "Father of two who…." (yes, this happens).

If you include links to external sites, have the links open in a new window, leaving your original tab in place. Otherwise, the potential hirer may be tempted to go down a rabbit hole of interesting clicks and end up too many back-arrows away from your profile to care enough to slog their way back (not admitting guilt — well, sort of).

Build a Portfolio

If you are just launching your career as a freelancer, develop a portfolio of work samples in an industry or subject area that interests you. For example, Big Pharma is worth hundreds of billions of dollars and presents many opportunities for outsourced content. In addition to highly specific content like FDA applications and testing protocol reports, pharmaceutical companies generally have consumer-facing web pages. Thus, a company that develops veterinary medicine might welcome an article or blog post on special concerns for the senior dog, with a focus on a disease treated by medicine that the company produces.

Show a range of work that demonstrates your knack for translating technical topics for a less technical audience in a clear and engaging way. Your samples could include user guides, software or hardware documentation, online help, FAQs, product descriptions, catalog blurbs, or informational web pages. If you have created videos or scripts, include them. Vidyard and Demand Metric[2] reported a 254% increase between 2019 and 2020 in organizations producing more than 50 videos.

And don't neglect the growing need for business-to-business (B2B) content. Robust industry segments that rely on specialized technology include hospitality, shipping/logistics, real estate, finance, and medical technology/HealthIT.

Pick Your Poison: Generalist or Specialist?

Forbes contributor Jon Younger[3] interviewed business leaders about opportunities and challenges facing freelancers. The most common advice reported was to establish an area of specialization, even hyper-specialization, rather than compete with generalists, especially when it comes to tech. As Nigel Sarbutts, founder of the freelance platform PR Cavalry, put it, "Go deep, go niche, and thrive."

Specialization brings definite advantages. If you specialize in a subject area, your freelance business may ramp up more quickly. You spend less time gathering the background needed for new assignments, and you have a better chance of well-paying clientele passing your name around in a certain segment.

But not everyone is in the "go niche or go home" camp. Some technical subjects can be adequately addressed with intellectual curiosity and solid research skills — and a talented generalist has the versatility to fill many needs at a company. As a generalist, you may find yourself becoming the go-to person for all things editorial, allowing you to forge contacts across teams or departments. An added bonus is a natural immunity to "insider's syndrome." Those with deep sector knowledge can't un-know what they know. Specialists may have a harder time assuming a naïve user's perspective that could facilitate a connection with the audience.

Show a range of work that demonstrates your knack for translating technical topics for a less technical audience in a clear and engaging way

Mind Your Business — and Your Wallet

Sidestepping misunderstandings with customers protects your bottom line. Once you land an assignment, be clear from the outset about what the scope of the project is, how many revisions are expected, who the stakeholders are that you depend on for sign-offs, how many iterations of a document you are expected to participate in, and where the project is in the development cycle so that you can estimate the number of tweaks.

To reduce the number of revisions, request that stakeholders who must approve the final product also sign off on an outline and draft. It's no fun when the person they forgot about comes in at the 11th hour with a load of changes.

Some companies assign a writing task as a tryout, and most will treat it as a paid assignment. Not all companies, however, compensate contenders for their writing trials. Before you accept an unpaid assignment, think about how much you want the job or the association with this particular company. If the sample requested is long or complex, and you still wish to pursue it, a reasonable compromise might be to provide an outline and a fleshed-out section or two. The outline will reveal your sense of content architecture, and the completed sections will show your writing style.

Bridge the Gap Between Technical Communication and Marketing

As marketing budgets have hit an all-time low,[4] the integration of marketing and technical communication has become increasingly important. Technical content in its many forms has a place along the entire customer journey, both pre-sale and post-sale, and the customer's experience with technical content can be a big factor in a purchase decision for both business-to-consumer (B2C) and B2B sales.

Today's tech-savvy consumers want a solid understanding of the product or service before they buy, and surveys show that buyers spend the majority of their time in background research before even speaking to a seller.[5,6] In their initial exploration, potential customers may check out a website or blog, look at FAQs, view a video or webinar, investigate online demos, seek out user reviews, and more. Even well-written product instructions can act as a sales tool as buyers compare their options.

Include some lively, short-form content in your portfolio, and work in some copywriting techniques. Lighten the tone, perhaps even dipping a toe into "infotainment" (with caution). Infuse some journalistic flair, tell a story, and bring in the *why,* as well as the *how.* You might begin a how-to guide or getting-started tutorial with a short introduction that mentions how the product or service will benefit the user (*why* they want it). Next comes your clear, concise, and friendly tech content (*how* they will use it). Finally, wrap up the piece with a "looking forward" conclusion — a call to action, however informal (e.g., "Contact us for more information"), advice on what to do if the user experiences a problem (with a link to troubleshooting material), a goodwill message, or an invitation to leave feedback.

Well-written product instructions can act as a sales tool as buyers compare their options

Channel Your Customer

Familiarize yourself with your customer's website and social media to get a feel for their tone and persona. Do they lean more toward light and breezy or serious and authoritative? Pay attention to punctuation, sentence length and structure, point of view (use of "you" and "we"), and word choice. Do they use sentence fragments, contractions, dashes, and exclamation points? Or are they semicolon types who write in full sentences?

Maggie Koerth-Baker, a celebrated science journalist who has earned her distinctive voice, recalls her early years as a freelancer "absorbing the voices of publications and vomiting that back" — which she still feels is "insanely good when you're starting out, because it makes you [seem to editors] like you need less editing."[7]

Reinforce Your Image as a Professional Writer

In an industry survey, Carliner and Chen[8] found that second only to understanding the subject matter, technical communicators were expected to have excellent writing and editing skills. This is a given for professional writers, but how do you establish your writing competence early on?

Love is in the details, so keep the following in mind:

- **Write for re-use**: Even if you are not writing for machine readability, principles of sound content architecture apply to all documents. Incorporate a modular, topic-based design around chunks of text that can be recombined and repurposed for various needs and begin informative headings with meaning-laden words.
- **Make it pretty**: Use formatting features for clarity, accessibility, and attractiveness.
- **Check your work**: Don't leave all the editing to an editor; sloppy mistakes are a turnoff that will damage your reputation.
- **List your sources**: Referring to "a recent survey" without giving the date and author of the study is not sufficient.
- **Keep an eye on version control**: Keep track of who has seen each version of the document. If you do not have instructions on the customer's file-naming conventions, include the project, your initials, the date, and the draft or revision number — e.g., "MRI-faq.rev1.bd.121521." Hold on to interim versions of the document until you have been paid for the final deliverable.
- **Make the most of your time with a subject matter expert**: If you have the opportunity to interview a subject matter expert, act as if you have one shot to get the information you need. One respondent to Carliner and Chen's survey expressed that having to explain something more than once is "very frustrating."[8] Do your research beforehand, don't leave the interview without the information you require, ask for clarification when needed, or rephrase information to check your understanding. You may want to ask to record the conversation.
- **Tap the testers**: If you have access to testers, they can be your best resource, as they can give you a more authentic user perspective unimpeded by insiders' assumptions.
- **Ask about style**: Ask new customers if they have an in-house style or follow an existing style manual. If yes, great; your job will be easier. If not, great as well; your query will add to their perception of you as a writing professional. In the absence of a style guide, you can gather guidelines from the company's website on specifics like heading capitalization, dash type, "data is" versus "data are," abbreviations, and serial commas. Create your own style guide for more efficient writing, as well as for future projects with that organization. If the company is aware of a guide you create, you will be seen as their writing expert.

Play Well with Others

Service with a smile goes a long way for technical communicators. If you establish ongoing relationships with key customers, work can be steady — this is easier than chasing down a series of one-off projects for different companies. Steady clients mean less time to get up and running on each new assignment, fewer misunderstandings regarding the customer's process and expectations, and a greater chance of working on related projects and thus less chance of wasting unused research.

> **Just like the job-seeking adage "the decision to like is the decision to hire," freelancers will find that "the decision to like is the decision to re-hire."**

The likability factor is influenced by your flexibility, timeliness, and pleasantness in interactions with others, so communicate, remain open to others' ideas and criticism, always be polite and professional, and be mindful of turnaround time. Just like the job-seeking adage "the decision to like is the decision to hire," freelancers will find that "the decision to like is the decision to re-hire." ■

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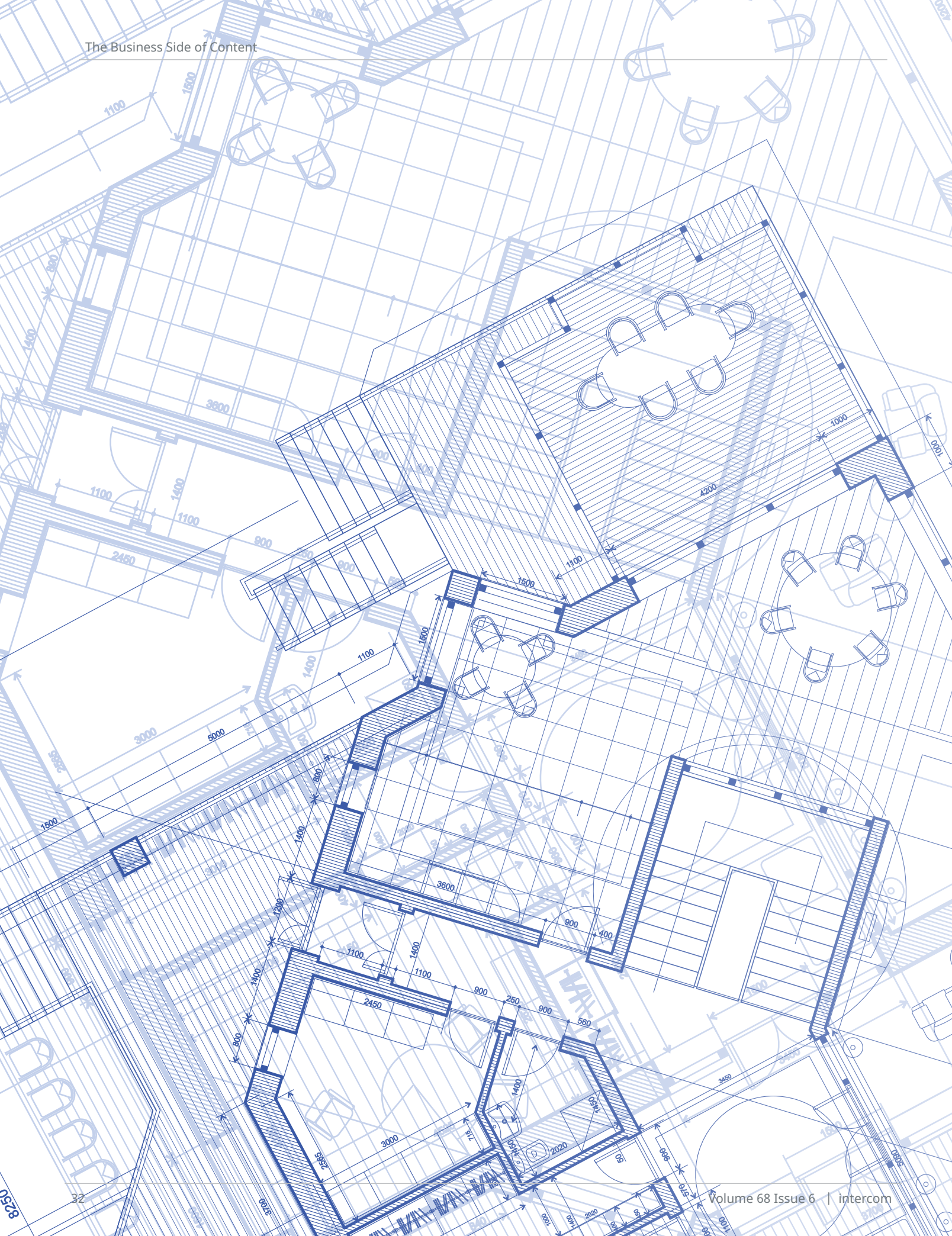

Architecting Standard Operating Procedures in SharePoint Online

By Aleshia Jefferson, STC Member

Move beyond the body of the document and focus on continuous improvement

In 2016, my company acquired the Microsoft Office 365 Enterprise Cloud software package along with Microsoft Power tools and other Microsoft products. With this came a push from my company's information technology (IT) department to have all workers house all business-related documentation in SharePoint Online (SP). Communications that followed insisted that within two years, all legacy software would no longer be supported and that all site owners were to build sites using only out-of-the-box (OOB) SP features.

At the time, I was part of the company's learning and development (L&D) department, and worked with project managers, instructional designers, technical content writers (TCWs), and managers. My work segment was responsible for writing, storing, and publishing clinical and medical standard operating procedures (SOPs) and accompanying job aids, which were used by medical and clinical managers, front-line-staff, and some third-party vendors to support our members.

Prior to the upgrade, we were using a SharePoint 2010 site that had been haphazardly built by a single person who did more harm than good by customizing the site without gathering customer or team input. When we switched to SP Online (2016 version), again, instead of collaborating with the team and end-users, the same person customized the main library that we used to create, house, and publish artifacts.

Within the next two years, the owner who had customized features in our site left the company, and all customized interoperability and maintenance of the site rested on me to unravel, as there were no policies and procedures (P&Ps) written about using the customer-facing components or updating the backend of the site. I had only used the on-premise version of SP 2007, and I was not fully familiar with SP Online. Our team was reorganized, as well, and my work group became a team of three TCWs plus a manager. We were shuffled to the Quality & Accreditation department along with more than 1,200 SOPs.

The Task

My small team became responsible for planning, designing, writing, housing, publishing, and archiving SOPs. We had more than 1,200 SOPs, which included those that were outdated, duplicated, and mid-review. All SOPs (regardless of state) needed to be transitioned from L&D to the three TCWs. What's more, these artifacts were written to support multiple internal lines of business across several states and varying product lines.

Our manager wanted us to reconstruct the site (that we now shared with the internal training department) and put in place governance rules so that our team could work more efficiently. At the time, the specific goals for our team were to:

- Reduce the number of SOPs to less than 100.
- Remove redundant procedures.
- Provide content that focused on treatment and handing the member from a business operations perspective.
- Add a set of outcomes per procedure to enhance performance.
- Make the SOPs system agnostic (i.e., abandon all software tools and system callouts along with instructions for using the tool or system).
- Reconstruct many of the process diagrams or images, because the shapes used were not consistent across the lot.

The effort to make these changes would take longer than a year — especially with only three people — and the effort would be monumental. And early in the process, we lost our manager. Regardless, as a team of three TCWs, we took

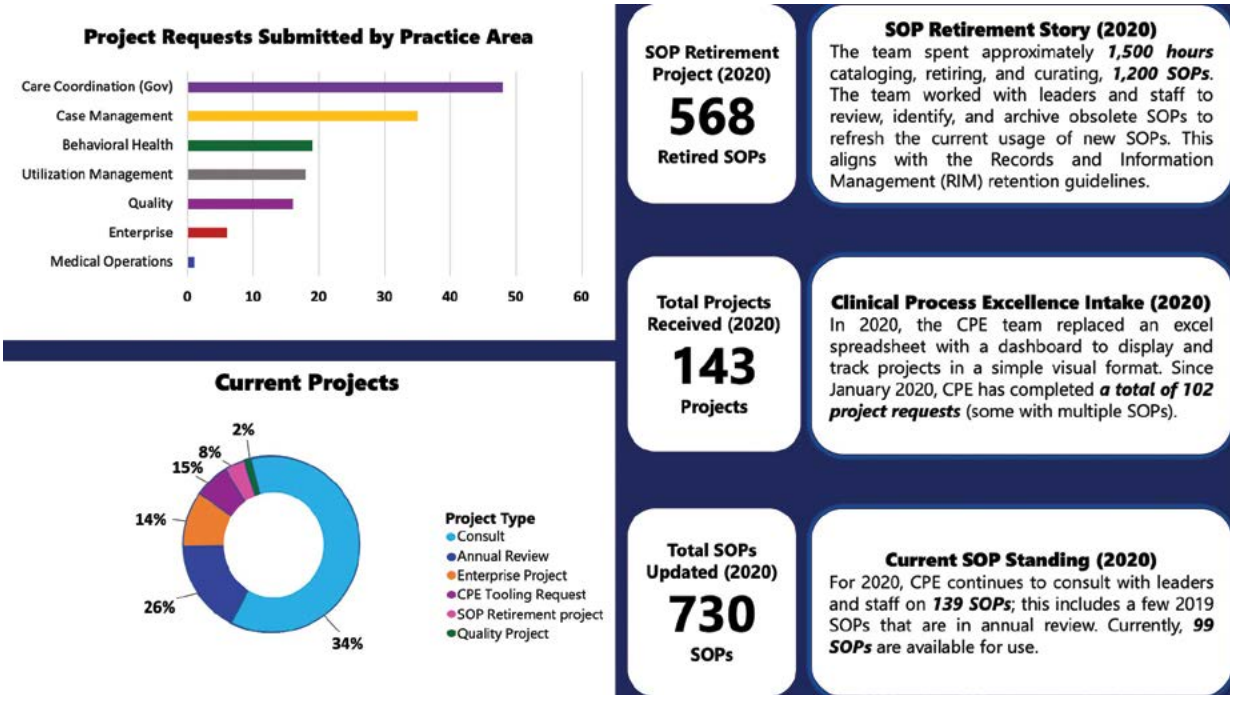
Project Requests Submitted by Practice Area
Care Coordination (Gov)
Case Management
Behavioral Health
Utilization Management
Quality
Enterprise
Medical Operations
0
10
20
30
40
50
60
Current Projects
2%
8%
15%
14%
26%
34%
Project Type
Consult
Annual Review
Enterprise Project
CPE Tooling Request
SOP Retirement project
Quality Project
SOP Retirement Project (2020)
568
Retired SOPs
SOP Retirement Story (2020)
The team spent approximately 1,500 hours cataloging, retiring, and curating, 1,200 SOPs. The team worked with leaders and staff to review, identify, and archive obsolete SOPs to refresh the current usage of new SOPs. This aligns with the Records and Information Management (RIM) retention guidelines.
Total Projects Received (2020)
143
Projects
Clinical Process Excellence Intake (2020)
In 2020, the CPE team replaced an excel spreadsheet with a dashboard to display and track projects in a simple visual format. Since January 2020, CPE has completed a total of 102 project requests (some with multiple SOPs).
Total SOPs Updated (2020)
730
SOPs
Current SOP Standing (2020)
For 2020, CPE continues to consult with leaders and staff on 139 SOPs; this includes a few 2019 SOPs that are in annual review. Currently, 99 SOPs are available for use.

Figure 1. End-of-year SOP results in Power BI.

ownership of the challenge and the solution, and we prevailed.

In this article, I focus on how I was able to use Microsoft's Power BI platform to tell our story and showcase our efforts after building out the solution, including the supporting processes, by presenting qualitative and quantitative information to the associate vice president (AVP) of our department.

Understanding Metrics and Visualizing Results

I am not a data analyst or a data engineer, but I had to figure out, ask questions, and study materials about gathering data to gain results. As technical writers, we manage mounds of documentation data, but while in school technical writers receive little or no guidance for learning how to derive metrics for their work or directly for documentation. What happens when we start to think about documentation metrics from the perspective of customer service, customer experience, performance, operations, or from the point of view of supply chain management? The questions we ask about our documentation change dramatically.

For written, end-user documentation, in the past, the typical data collected has been quantitative data, using Likert scales, where writers ask surface-level questions about the document itself. For example, they might ask:

- Is the content readable?
- Does the document list the correct version number?
- Is the title appropriate?
- Is the information clear to the reader or user?
- Is the document grammatically correct?
- Is the style consistent?
- Can the user find the document?

As technical writers, it is time for us to move beyond creating metrics about what is in the body of the document to defining those metrics that move us toward continuous improvement, so we can present our work as invaluable to company leaders.

To display a visual representation of the data related to our work, I used the Power BI. Because the TCWs reported directly to an AVP, there was no middle manager between us, so we needed to tell our story to present what we did at a very high level and provide facts and content designed to enable good business decisions.

We also needed to pull consistent data based on our work. In the past, we incorrectly reported counts of our documents as a result of gathering this information manually and populating an excel spreadsheet. With Power BI, we could automatically pull the data from our SharePoint sites, which would provide more accurate data and a clearer picture of our work (as individuals and as a team).

As technical writers, it is time for us to move beyond creating metrics about what is in the body of the document to defining those metrics that move us toward continuous improvement, so we can present our work as invaluable to company leaders.

I had to create a visual for the AVP to present to other leaders on our behalf, and I was not only able to pull quantitative data, but I was also able to tell a few stories (qualitative data). Figure 1 shows that story.

The AVP wanted to be able to provide a big picture summary of our work, and the additional request was to keep it simple. I was asked, "What is your key performance indicator (KPI)? Can I see a burndown?" This language was familiar, but at the same time foreign; I had only heard these terms during meetings where managers or project managers presented data and discussed strategy. I did not know what I was up against, but I knew I needed to:

- Understand the company's strategic goals and how they cascaded to my work.
- Know, or find out, what my manager wanted to report to the leadership to make a statement about how the team was achieving the business objectives.

I learned that when creating a KPI, I needed to define a targeted, measurable value to show how

successful a team could be at accomplishing the business objective. The business objective for our team was to drive results, and one goal was to automate processes. Our KPI was to "decrease 1,200 SOPs." I turned this into a supporting metric by making it a more specific goal, which my team had already stated, and that was to "decrease 1,200 SOPs to less than 100." Now, to make this SMART, we set a deadline for the end of the year (e.g., "decrease 1,200 SOPs to less than 100 by December 31, 2020"), creating a SMART goal and a KPI to present to management.

I suggested to the team that we look at the whole picture regarding the SOPs, separate the old from the new, and *not* try to update all 1,200 SOPs. As a result of that thinking:

- 568 of the SOPs could be immediately archived; they were created before 2019.
- Any SOPs published in 2019 or 2020, or were in progress, could be reviewed for decreasing to 100.

This brought the number from 1,200 to 632 immediately, and instead of a single overwhelming project, we had two more manageable projects.

Just after separating from L&D, I created an archive library where I checked for appropriate tagging, but I needed to ensure that every file had been opened and the effective, approved, and published date columns were populated to match the columns in SP. My coworkers volunteered to assist with this effort, and after we updated the dates in SP, I submitted a ticket to our IT department and asked them to duplicate the existing archive. When that was complete, I deleted all artifacts from the newly duplicated library marked 2018 and older, and I performed the same exercise with the existing (archive) library by removing any artifacts that were marked 2019 and newer.

Next, I listed the tools needed (i.e., the SP work request list, the SP publish library, the archive library, and Power BI). The work request list would be key for several items that needed to be counted or listed, and each submitted request would be considered a project, regardless of how many SOPs were attached or SOP titles were listed. I also listed a few questions that would help me capture metrics for a visual. These qualitative questions included:

- What was the cycle time between receiving a request and completing it?
- How much effort was spent, in hours, by each TCW to work through a project?
- How do I visualize a burndown of the 1,200 SOPs?
- How many total projects would we work on throughout the year?
- How can the set of 568 archived SOPs be reviewed and cleaned up, and the effort tracked?

Mid-year, we presented our project rationale and goals to our AVP, and I wanted to reiterate a condensed version of our story (qualitative) by pulling that information into Power BI. Therefore, the quantitative metrics that could be pulled from my sources and presented to the AVP were the:

- Number of project requests submitted by practice area
- Percentage of all work done by the team per project

Document Reduction Savings

	Old SOP Model (2019)	New SOP Model (2020)	Impact	Savings
Document Count	1,200	96	Removes 472	$1,700,160
Average Hours/Document*	20	20	-	
Total Hours	24,000 hrs.	1,920 hrs.	Saves 22,080 hrs.	
Per Person Savings**	$1,848,000	$147,840	-	

*Average hours per document based on historical L&D data and processing time.
**Assumes $77 per hour FTE cost (source: *PayScale*).

Figure 2. SOP resulting ROI.

- Number of actual SOPs retired based on the total of 1,200
- Total number of incoming projects being worked in addition to cleaning up the SOPs
- Total number of SOPs updated during the year

From a qualitative perspective, I could tell three stories in Power BI:

- The retirement project, the effort spent in hours, and how this benefited the company
- The process of manually entering data and activities into MS Excel, and moving the team to an automated process using Power BI
- Announcing whether the team had met the goal of reducing 1,200 SOPs to less than 100, and providing the new number of SOPs

With the help of my teammates, we were able to craft these three stories that summarized our year-long work activities, illustrated in the Power Bi dashboard that I submitted to our AVP (Figure 1). This was exactly what our AVP needed, and I was able to keep it simple and clean.

We were also able to discuss the return on investment (ROI). Our team had presented this information early at the start of the project, and I updated it to show the new ROI based on the reduction in SOPs.

We identified a case for an SOP ROI when we discovered that end users visiting the L&D site to search for SOPs might spend hours searching for an SOP. The search might pull multiple SOPs, some duplicates, some outdated, some belonging to a different practice area, but all having the same name as what they were seeking. In addition, the SOPs were incorrectly tagged within the library, these searches took time, wasting the hours being spent on locating and clarifying procedures in SOPs. To show this, we laid out the visual in Figure 2, showing an example of the resulting ROI and comparing it to the prior ROI before our team began handling SOPs.

The outcomes based on this model were possible increases in worker productivity, increases in worker knowledge for their practice area and procedures, reductions in audit errors, and reductions in worker turnover.

Ask Yourself

I would not have fully understood how to ask questions regarding end-user documentation metrics or know that I could tell a story using metrics had I not conducted research and attempted to remodel some of the information communicated in other business areas. I had also learned about metrics during my tenure as a project manager and by taking Six Sigma courses. By working through the kind of information needed to support a KPI, I had to think beyond asking surface-level questions associated with the body of documents. The journey was not easy, because information about gathering and displaying metrics for end-user documentation is rare.

I wanted to place more focus and emphasis on the people side of end-user documentation, formulating metrics based on experiences, so I immersed myself in seeking more insightful adaptations related to customer service, customer experience, performance, management, operations, or supply chain management. If we review metrics devised for other business areas and reassign them to fit end-user documentation, TCWs can begin to demonstrate impact, prioritize efforts, and show corporate leaders that TCWs add value to the bottom line.

As an industry, we should ask ourselves:

- Why do we continue to think of end-user technical documentation as a commonplace activity, where we create materials, if needed or as needed, to explain how or what to do?
- If we are not collecting, tracking, and continuously measuring how to improve end-user performance through documentation, how can we know where the gaps and errors are situated?
- How can we continue to improve and grow our knowledge and insight about documentation and its processes?

By asking the right questions, we can work toward meeting the business needs. ■

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THE Business Value OF Content

By Society for Technical Communication

Quality content can improve your organization's bottom line

We know intuitively that good content brings value to the organization, and that it isn't simply a cost center. Good content educates, informs, and is the cornerstone to solid relationships. What, then, is the business value of content?

And of course, like all things, the answer is "it depends."

Content in and of itself doesn't have any inherent value. What matters is how it's used to support the needs of customers and the organization.

Professional communicators have a unique understanding of users and needs. "Without an intimate understanding of our users and their needs, how can we design information intended to assist them, or help them do their jobs more efficiently?" asks Elizabeth Filippo in the December 2007 issue of *Intercom*.[1]

Good content:

- Puts customers' needs first
- Reduces complexity and improves understanding
- Allows customers to solve their own challenges
- Improves the customer experience when assistance is needed
- Reduces friction in the sales cycle

> **"Quality, relevant content can't be spotted by an algorithm. You need people — actual human beings — to create or curate it."**
>
> - Kristina Halvorson
> *Content Strategy for the Web*

"Content must be consistent across the omnichannel environment, enabling customers to receive the same information from a phone call, a chat, an email, or a text," explains Dr. Liz Herman, STC Associate Fellow. "Content is the fulcrum of [the customer experience]."[2]

When content does these things, it reduces costs and improves the organization's bottom line.

Customer Service Isn't Cheap

The average service desk spends nearly 70% of its budget on staffing costs.[3] The remaining 30% is overhead.

The differences in the business cost of customer service are largely influenced by the cost of labor. The average cost per service desk call ranges from $6.31–$8.84 in the U.K. (with only 25% of surveyed companies measuring cost per call),[1] to

an average of $15.56 for U.S. companies.[4]

The cost of resolution increases with higher levels of support. Not only do these calls take longer, but they also involve more highly paid staff.[5]

We need to look at the cost of customer service on a continuum. In figure 1, we see examples provided by HDI showing the escalating cost of customer support.

> **Each level of escalation is a layered cost: a call escalated to IT support incurs the costs of the service desk, desktop support, and IT support, totaling $195.**

As we can see from the data, content that can prevent incidents or resolve them through self-help resources cost just a fraction of what a service desk call would cost. Incident prevention not only costs nothing, it also makes the customer and the organization happy.

Also note that each level of escalation costs a *total* of the cost to the service desk, desktop support, and IT support. For example, a call that needs to be escalated to IT support costs $22 + $69 + $104, for a total of $195 for a single help ticket.

Reducing the Cost of Customer Service

How can these costs be avoided? By providing quality content that puts customers' needs first and allows them to solve their own challenges.

There are three obvious ways to improve the company's bottom line:

- Spend less — usually on labor by placing call centers in lower-income areas.
- Have better self-help content so customers can address issues without call center intervention.
- Have a better knowledge management center so customer service reps can quickly and efficiently find the resolution to the customer's issue, avoiding the need for long calls or escalation to higher-tier support.[7]

According to Zendesk, most users prefer to opt for self-servicing.[8] Technology that allows users to self-service improves customer satisfaction, limits the demands on the help desk to handle issues that are easily resolved, and reduces support's cost per call.

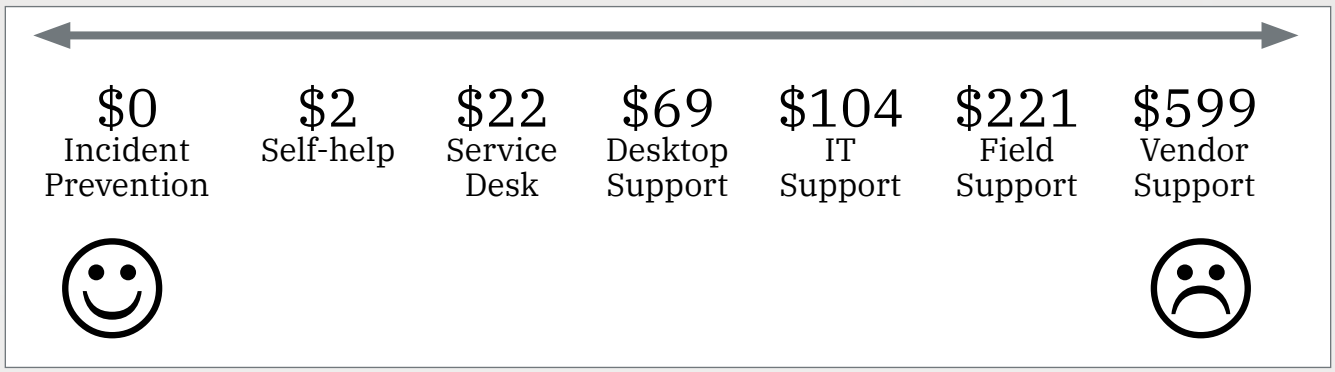

Figure 1. Data from HDI: The cost of customer support.[6]

Takeaway

A quality knowledge base, a self-service help portal, interactive voice response (IVR) messaging (in the event of an outage or crisis), and proactive communication can reduce the need for service desk calls, saving companies money.[9]

The Hidden Cost of Poor Customer Service: Customer Retention

Customer service calls also have a hidden cost: the cost of customer satisfaction. No one wants to have to pick up the phone, navigate the menu options, and listen to gravelly hold music just to get their issue resolved. It's no surprise, then, that Zendesk found that customers want to help themselves. In fact, 69% want to resolve as many issues as possible on their own, and 63% always or almost always start with a search on a company's online resources when they have a problem.[10]

> **Engaging educational content can reduce customer churn. Just a 5% increase in customer retention can increase an organization's profits by 25%-95%.**

There is general consensus that customer acquisition costs five times what it takes to retain an existing customer.[11] This is not simply because of the literal costs of acquisition, but also the impact of dissatisfied customers sharing their negative stories with friends, colleagues, or on social media.[12] Conversely, companies benefit from satisfied customers who refer other qualified customers, building the sales and customer pipeline.[13]

> **Content that can prevent or resolve incidents through self-help resources cost less than 10% of what a service desk call would cost.**

U.S. companies lose $136.8 billion each year due to *avoidable* customer switching[14]:

- American Express found that 33% of customers will consider switching after just one instance of poor customer service.[15]
- Eighty-nine percent of businesses see customer experience as a key factor in driving customer loyalty and retention.[16]

> **Reducing churn in from $100/month to $25/month in a software subscription model can save a company nearly $30,000/year.**

Increasing customer retention rates by just 5% can increase profits by 25%–95%.[17] One customer experience agency found that loyal customers are five times as likely to repurchase, five times as likely to forgive, four times as likely to refer, and seven times as likely to try a new offering.[17]

Engaging educational content can reduce churn by 6%.[18] This includes:

- Investing in customer service (with proper content to support the CSRs)
- Providing positive customer experiences (through content and communication)
- Delivering quality information, when and where it's needed, at all stages of the lifecycle

Good Content Takes Work

Good content doesn't just happen. It needs to be written by professional communicators.

What can your organization save if you don't lose dissatisfied customers? Let's use a software subscription model as an example.

- Losing just 100 customers a month at $14.99/month = $116,922/year
- Retaining just 25% of those customers through good customer service = **$29,230.50/year savings**

Takeaway

The quality of customer service affects the retention rate. Ninety percent of customers have stopped giving their business to a company after a poor service experience.[19] Customer retention through high-quality content can have a positive impact on the bottom line.

The Cost of New Customer Acquisition: The Sales Team

Especially in the big-ticket business-to-business (B2B) space, salespeople aren't cheap.[20,21] The number one challenge facing inside sales teams is improving productivity and performance.[22] The answer to this improvement lies in content.

Do your sales reps have the resources that they need to sell? Do they have a consistent elevator pitch to get them in the door? Do they have a consistent slide deck that they can use for customer presentations? Do they have documentation on hand for technical questions? Or are they creating these things ad hoc?

If you assume the national average of $34/hour for a sales rep — not including benefits, incentives, and bonuses — poor content for salespeople costs your company money:

- Recreating the elevator pitch: $34/hour times .5 hours/rep = $17 cost per rep
- Recreating the slide deck: $34/hour times 2 hours = $78 cost per rep per client

According to *Selling Power* magazine's Selling Power 500 list for 2018, there are more than 25 million salespeople in the U.S. alone.[23] If even one tenth of those salespeople are spending time recreating their elevator pitch, that's more than $42 million in lost productivity.

Improving the Value of Sales Training

Sales reps' solo efforts negate the value that a company put into annual sales training, which is staggering.[24] These events usually include sales reps, upper management, marketing, technical specialists, and outside speakers/facilitators.

- Airfare: $800/person
- Hotel, 3 nights: $600/person
- Meals, 3 days: $450+/person
- Other transportation: $200/person
- Group activity/speaker: $350/person

That's an approximation of $2,400/person, not including facility fees. The content and training that they receive at these events needs to be high quality to make it count.

Takeaway

Anything that can be done to reduce friction can accelerate the sales cycle and reduce the cost of sales. This can include traditional marketing messaging (web content, datasheets, white papers, sales decks), as well as what was traditionally thought of as post-sales technical content (documentation, support, etc.).

How Can Companies Avoid Churn and Retain Customers?

How do we retain customers? By building trust. And we build trust through communication and content.[25]

Organizations need to take a proactive approach to customer service. Anticipatory service eliminates problems before they occur.[25] Over 85% of companies say that efforts to improve customers experiences have a positive business impact.[26]

Good Content Transcends Silos

There is a blurring of the lines between technical communication and marketing communication. Customers don't make a distinction between the two; communicators need to be empathetic to their needs, which is separate from internal silos. Customer retention is a byproduct of customer service and experience. Create a good experience, that's consistent and predictable, and you have a shot at customer retention.[27]

Takeaway

Good experiences drive customer loyalty.[28] Communicate well. Educate customers with good content. Proactively understand and address their problems to create a smooth and positive customer experience that respects their time.[29]

Customer Satisfaction Demands Quality Content

The most effective channels used for customer acquisition or retention are content-driven[16]:

- Email
- Social media
- Content marketing
- Referral marketing
- SEO
- Display/mobile advertising
- Video
- Documentation
- Service

Putting the creation and maintenance of these tools in the hands of professional communicators will improve outcomes, reduce costs, and directly contribute to the organization's bottom line. ■

This paper was created for STC Roundtable in 2020. It is intended to stimulate thinking about ways that content can be viewed not as a cost center, but as a powerful catalyst for business performance.

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Join the STC Slack!

All STC members are welcome and encouraged to join the STC Communities Slack to meet, engage, and collaborate with fellow technical communication colleagues.

Get Started

First, create your Slack account. Once complete, visit *https://www.stc-communities.slack.com* and check out STC's workspace. A workspace is a segment of a Slack channel, to help with compartmentalizing information and discussion topics.

Slack Channels

STC has a great number of Slack workspaces. Everyone who joins the Slack will be added to these channels:

- #introductions: Say hello and introduce yourself to the group.
- #general: Start here for general STC and techcomm topics, questions, and conversation.
- #slack-help: Get help with using STC Slack.
- #webinars: Learn and join fellow STC colleagues for online education events.
- #community-events: Check out what our virtual (SIG) and geographical (chapter) communities are up to.

Other Channels

- #programideas: Let us know what topics and subjects we should consider for an education program.
- #website-feedback: Having issues with the *STC.org* website or have suggestions? Tell us here.

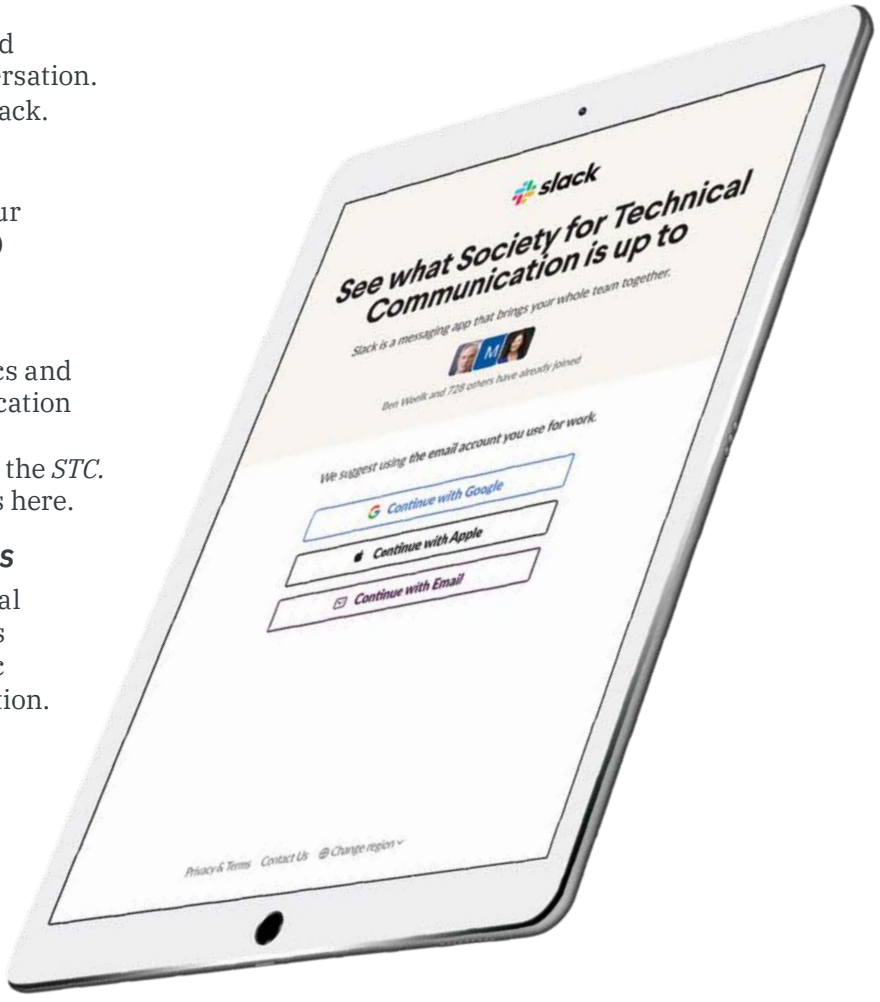
Community of Interest (COI) Channels

We have topic-based channels for our virtual Special Interest Group (SIG) – Communities of Interest (COI) that are focused on specific subject areas within technical communication. Members of these communities are encouraged to use these channels to meet, engage, and collaborate with colleagues who have similar interests.

Conduct Guidelines (#slack-conduct)

Everyone who joins the STC Slack community is valued and should be treated with respect and courtesy. As such, we have a Code of Conduct thread that lays out the expected behavior of Slack members; it applies to all channels and areas of the STC Communities Slack workspace. We also have a thread with guidelines for Reporting Issues, for cases of conduct violations or instances where members feel certain behaviors should be looked into or addressed. ■

Visit **https://stc-communities.slack.com /archives/C01FAJB8G10 /p1606787932002400** for more information.


slack
See what Society for Technical Communication is up to
Slack is a messaging app that brings your whole team together.
We suggest using the email account you use for work.
Continue with Google
Continue with Apple
Continue with Email
Privacy & Terms
Contact Us
Change region

Upcoming Live Webinars

Managing the Middle Years of Your Career

Presenter: Saul Carliner
Wednesday, 1 December 2021, 1:00–2:00 PM EST

With the 2018 "census" of technical communicators showing that majority are at mid- or late career, a key challenge people face is strategizing how to remain employable. Some of the issues people need to think about:

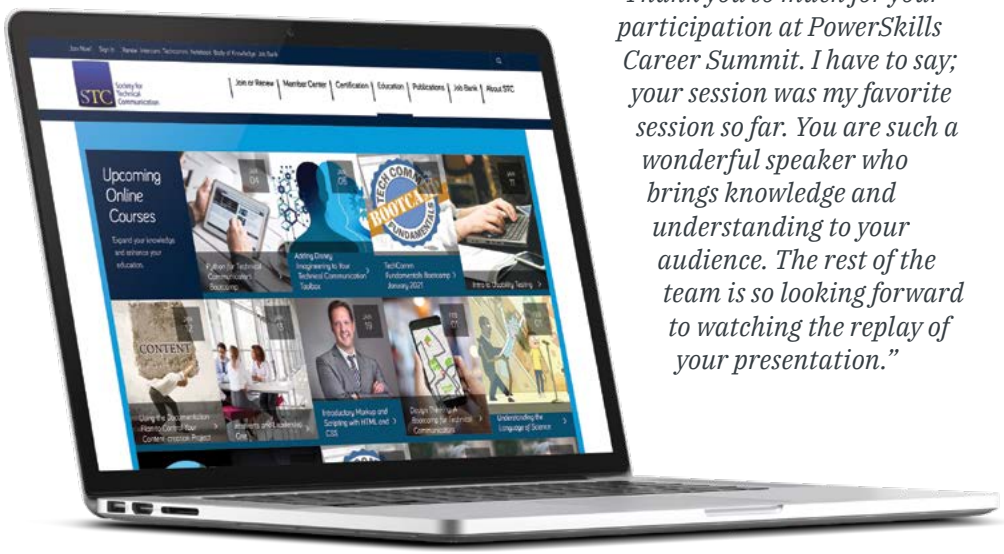
- Stay in my current job or leave it?
- Stay with my current employer in the same role or a different one?
- If I have to go on the job market, how employable am I?
- Will the skills I have serve me the rest of my career? If I need to adjust them, what should I do? And can I afford to do it?
- How does all of this translate into a coherent career — not just up until now, but for the time I plan to continue working?

This session explores these issues.

Specifically, in this session, participants learn to:

- Describe the shift from career ladders to career frameworks for conceptualizing long-term employability
- Explain how both formal learning and developmental work within the context of jobs each play critical roles in employability
- Describe a five-part model for ongoing learning and development, which includes learning, development, networking, side hustles, and personal investments of finances and time

This webinar is based on one presented at the PowerSkills Career Summit, produced by McGill University this summer. The organizer commented:



"Thank you so much for your participation at PowerSkills Career Summit. I have to say; your session was my favorite session so far. You are such a wonderful speaker who brings knowledge and understanding to your audience. The rest of the team is so looking forward to watching the replay of your presentation."

Rethinking Scientific Research Communication

Presenter: Jennifer Goode
Wednesday, 12 January 2022, 1:00–2:00 PM EST

Have you ever walked away from a research poster, scientific article, or academic seminar more confused by a topic than when you started or arrived? Technical communicators are perfectly poised to help with scientific, academic, or research content distribution and accessibility by providing clear, understandable text and images to accurately convey complex information. But they can support sharing of research information even further by employing three strategies for knowledge dissemination.

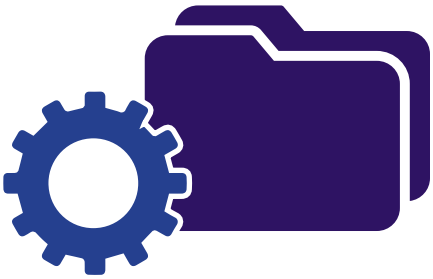
This presentation considers Mike Morrison's Poster 2.0 strategy, scientific project websites, and audio podcasts as unique communication forms that could help with knowledge sharing within academic, scientific, and research communities. ■

We Are TechComm KnowledgeXchange

STC has launched an initiative for new tech comm professionals (as well as those new to STC) to provide educational and networking opportunities to help you get started in your tech comm career.

KnowledgeXchange Panel Discussions and FAQs

Join us for the monthly "We Are TC: KnowledgeXchange" and participate in a moderated panel with seasoned tech comm professionals who will answer the most common questions we get asked about the industry and what you need to know to start your career as a tech comm professional. Each month will cover a different topic of interest. After the live presentation, there will be time reserved for audience Q&A with our panelists. Registration is not required, attendance is free, and these sessions are open to all STC members.



Upcoming KnowledgeXchange Panels

What Tools and Technologies Should I Know as a Technical Communicator?

Monday, 29 November 2021, 1:00 PM ET

Moderator: Liz Pohland, STC CEO
Panelists: Tim Esposito, Jack Molisani, and Jane Wilson

Description: Interested in learning about the tools every technical communicator should know? Join this panel to learn more about the most frequently used tools, tools that are both good and free to use, the different tools for Mac vs. PC, and more. Bring your questions about tools for the open Q&A.

KnowledgeXchange: New Member Meet-Ups

You've just joined STC! Congratulations! Now what?

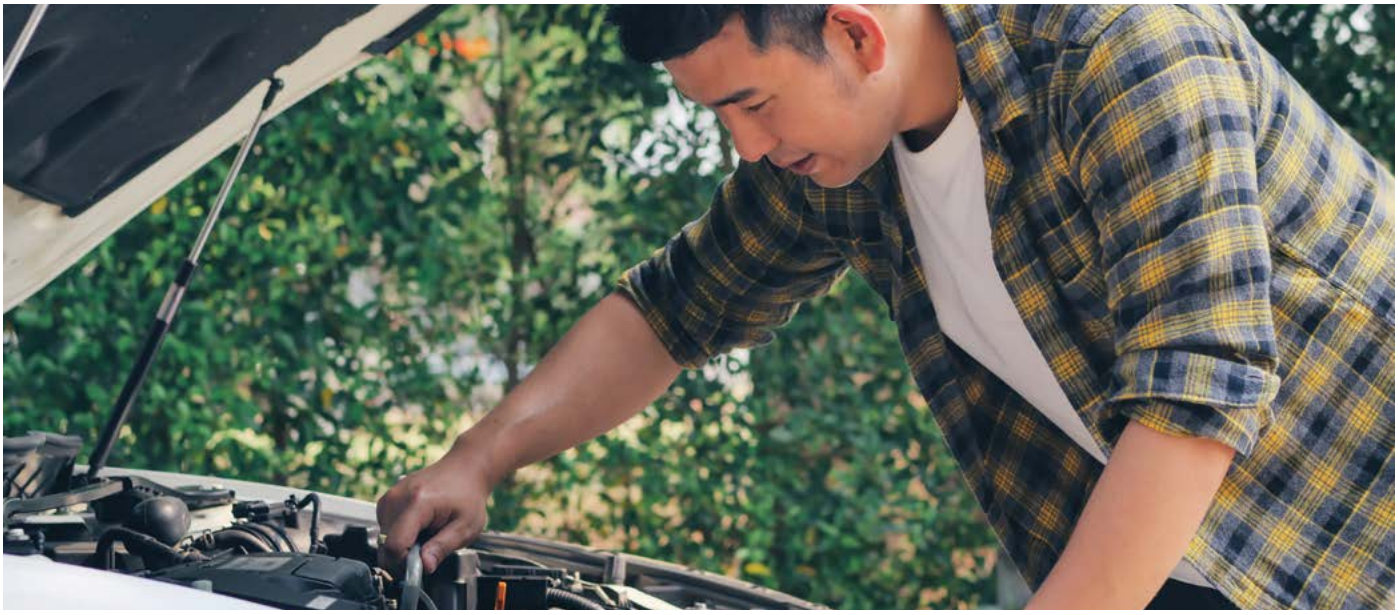
Join STC for informal, live meet-ups specifically meant to be a space for new tech comm professionals and those new to the Society to network and ask questions about STC, member benefits, and how to use your membership to your advantage. Each meet-up will spend a few minutes covering key information about STC and its different products and services, with the rest of the discussion and networking up to you! Bring your questions and ideas and attend one session or all! Registration is not required, attendance is free, and new STC members are invited to join us!

Meet-ups are held on the second week of each month — i.e., the second Monday of each month at 12:00 PM ET, and the Friday of the same week at 3 PM ET.

Upcoming New Member Meet-Ups:

- December 2021, 12:00 PM ET
- 17 December 2021, 3:00 PM ET ■

Visit **https://www.stc.org/membership/we-are-techcomm/** for more information on TechComm KnowledgeXchange!



Looking Under the Hood: Automated Content Production

BY THOMAS BARKER

Over 240 years ago, a Swiss clockmaker named Pierre Jaquet-Droz constructed a doll, named The Writer,[1] that could produce script handwriting, on paper with an ink pen, according to programmable mechanisms. The result was an early form of a tweet, only with a 40-character limit.

It may seem like something of a stretch, but today's equivalent of this marvel can be seen in the nearly 200 content management startups represented by AngelList[2] as of September 2021. These companies and agencies — in many ways the growth industry in technical communication today — are all about headless content, automated video content, AI assisted storytelling, and buzz-based marketing content. Like The Writer, they employ both humans *and* writing machines in their work.

In this column we will look at the academic conversation surrounding *automated content production* and the research underpinnings in AI that sustain it. We will uncover some key research concepts that can help content managers keep their writing machines tuned up. Let's take a look under the hood.

Some Terminology

The vocabulary of automated content production includes words to describe the outcome of these cognition algorithms: *content automation, automated content management, enterprise content management,* and *automated writing assistance.* These terms remind us of the ubiquity of automation in the process of content creation. One important application is in content marketing[3]: a very trendy tactic that focuses on creating customers through engaging content instead of simply pitching products and services.

According to researcher Loredanna Patrutiu Baltes, "Given that digital marketing requires the existence of a content marketing, the success or the failure of the company's online communication depends to a significant extent on the quality of its content marketing."[4]

Why is this so? At its heart, content marketing is about

> **At its heart, content marketing is about establishing relationships first.**

establishing relationships first. Sales come second. Further, content marketing is key to *market differentiation* in digital marketing[5] (using social media and web-based channels). Key to market differentiation is *target analysis*, which is often assisted by AI and data mining. For content producers, the logical pivot is to automated content production: cognitive artifacts admixed with software and digital components.

The engine that drives the branding and storytelling artifacts that characterize marketing is the analytical capability under the hood. These analytics provide the initial shape and flexibility of target audiences.

According to Bellini and Nesi, content production, the heart of content marketing, can be more efficient and cheaper if it is supported by artificial intelligence algorithms for content composition, formatting, protection, and workflow management, among other efficiencies.[6]

Automated Writing

Nothing can replace a team of innovative writers and technologists, journalists, IT professionals, and policy thinkers. But scan any list of management startups and you will find artificial intelligence platforms at work under the hood helping groups and businesses attract members, promote events, and sell products more effectively.

As one of them put it, "let the platform do the heavy lifting." The Wordtracker blog stops just short of saying AI can replace writers, but notes that it can "help in the process." In this supportive way, content automation is a part of any content management and development strategy. It uses the algorithmic and rule-based intelligence of software like Grammarly and Wordsmith to do this.

So today a community manager might use smart enablement and onboarding software to create user group profiles. The question this use poses is: how far can the automation of content production go? Will it continue only in a support role, or can it eventually lead to the production of semantic artifacts?

How far can the automation of content production go? Will it continue only in a support role, or can it eventually lead to the production of semantic artifacts?

What is interesting to us, apart from the fascination of watching The Writer click through his little writing task, his eyes moving in a lifelike way to follow his automated quill, is the perfection of the technologies — metals, miniaturization, timing — that Jaquet-Droz used in making this marvel. Without these technologies a writing machine would have been an imaginative product, imbued with magic or spells. But it is not. The turning of the wheels inside the doll vouchsafes the authenticity of the mechanism.

The technological advances — in engineering, materials, and know-how — that afforded for this human-like communicator have their modern counterpart in applications like GPT-3[7] that can easily pass mathematical, semantic, and ethical tasks for the creation of life-like prose.

If we look at the automated writers of today, we enter the world of content creation through artificial intelligence and natural language generation (NLG). The clinking escape mechanisms of the past are silent, frictionless algorithms working away behind dashboards and visualizations instead of a doll face.

It may be that research into automated content or automated contents support systems looks now just like a thing of the future. However, content managers today can easily spot trends in machine learning, artificial intelligence, and serverless architectures at academic conferences. These topics are harbingers of the advances it will be made by these technologies in the development of automated content systems. Writing that looks and sounds like it came from a real person ride the wave of these scientific explorations.[8]

The Research Agenda in Communication

These considerations of the research agendas surrounding automated content production and management raise even larger issues having to do with communication in general. Recent research in artificial intelligence end communication have begun to reflect that we are no longer simply communicating between one human and another, but between humans and machines.

We may be facing an era in which people may communicate less with other people and more with machines that act like other people. As researchers Guzman and Lewis point out, people now converse with Amazon's Alexa and Apple's Siri end with other items and appliances associated with The Internet-of-Things (IoT) *as if they were people*. They even note that the Associated Press is "using AI-enabled technologies in the production and distribution of news." Entrepreneurs in the content industry will use or compete with agencies that employ AI in content management in these ways. The most lifelike member of your content team may be an AI-driven bot.[9]

Human-Machine Communication: The New Frontier

Communication scholars are beginning to shift their focus of study from the human to the machine as the communicative subject. Entangled in this new web of relationships is talk between people and robots, other people and agents. The new frontier for communications research is *communicative AI*: conversations that used to be between humans and humans but are now between humans and machines directly (mediated, as before, by computers.) The computer is not out of the picture in its older role as the channel of communication, but the *communicating subject* is now the computer itself. I'm hearing, "So Dave, any luck with those pod-bay doors?"

More likely this dialogue will be between the reader and an automated blog, news article, or product overview. As before, the author, real or algorithmic, may remain anonymous. But not for researchers. They ask *ontological questions*: what happens down the road when our body of knowledge includes a library of AI-generated, natural-sounding research articles, white papers, and government policy documents? Guzman and Lewis focus on journalism and questions about authority in journalism. For example, they outline an agenda, focusing on the functional, relational, and metaphysical questions surrounding automated content.

For entrepreneurs and content creators, the issues might be more down to earth: investments in AI cost more or less than hiring a good writer; data mining, analytics, and IoT processing might just be technical problems; or content marketing using AI-assisted content development poses planning challenges. But the research community, and its academic conversations, can bring new value for managers and industry analysts, who look below the surface of the text at the algorithmic fingers tapping away.

In this column we have looked at the issue of automation in writing. As we saw, these technical advances, like those in older times, depend on undercurrents of research. Automated writing is such a technology that is beginning to show up in the form of process support for writing and cognitive artifacts themselves, texts written by computer algorithms. Communication scholarship is shifting in response to these more mature technologies. We are a long way from these cognitive artifacts, but their emergence prompts us to look at the scholarship and research at work under the hood. ■

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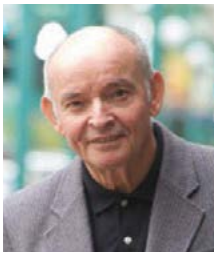


This column focuses on a broad range of practical academic issues from teaching and training to professional concerns, research, and technologies of interest to teachers, students, and researchers. Please send comments and suggestions to column editor Thomas Barker at ttbarker@ualberta.ca.

Meet the Change Agents:
Mapping Technical Communication Content Delivery to The Customer Journey

BY SCOTT ABEL | STC Fellow

In this installment of "Meet the Change Agents," I introduce you to award-winning digital content strategy guru Kevin Nichols. We explore the need for technical documentation teams to map the customer journey to deliver personalized content experiences at scale. He shares best practices and insights from content teams with scalable content personalization capabilities by building a firm understanding of the entire customer journey.

Kevin Nichols

Scott Abel (SA): What do you mean by the customer journey?

Kevin Nichols (KN): When I talk about a customer journey, I mean any model representing a customer's relationship with a brand that captures either the stages of their relationship with that brand or a task the customer is attempting to complete. Some folks find this term confusing because there are several different customer journey types. The most widely used are customer journey maps which present the various stages of a customer's relationship with a brand at a high level. Also, you probably know the sales funnel or buyer's journey. But you can also create more specific task-based customer journeys for specific, important tasks. Doing so can help you identify the paths your customers take across various touch points and the content they consume as they do so, such as creating an online profile, buying a product in a store, or downloading a white paper.

SA: Why is it essential for professional technical communicators to understand this?

KN: Because much of what customers need to understand how to do involves technical communication content. Increasingly, organizations in nearly every industry sector focus on improving content experiences to build customer loyalty. Self-service content is critical to successfully doing so. For business-to-business (B2B) relationships, technical content can make or break the deal. Bad content experiences can negatively impact B2B sales revenue. Technical content experiences often affect whether a prospect will purchase a product, or an existing customer will continue subscribing to a service. For the B2B buyer, if there is a distinction between marketing and technical content, it is the technical content they often need the most or consider the most valuable.

SA: What are the benefits of understanding the customer journey?

KN: There are several benefits:

- If you can anticipate the customer needs, you can meet them more effectively and efficiently.
- You can improve the customer content experience, making it more customer focused.
- You can improve content performance in a quantifiable way, and you can assign actual key performance indicators (KPI) to your content (i.e., does this content push them from one step of the journey to the next, did they achieve their goal?), which shows how well it performs.
- Analyzing the content that your competitors serve to prospects and customers — and taking note of when they deliver it (at what stage in the customer journey) — can identify opportunities to

provide customers with a more holistic content experience than they receive elsewhere.
- When you focus on delivering the right content at the right time (when the customer needs it) by mapping product and support content to the customer journey, you can expect to see increases in customer loyalty and satisfaction.

SA: How do we map technical communication content to the customer journey?

KN: The steps remain the same regardless of the type of content you are producing:
- Form a collaborative team that includes customer experience, user experience, customer insight, sales and marketing folks, customer satisfaction, training, customer support (anyone that can give you knowledge of the customer).
- Analyze customer data to determine the priority of tasks they need to achieve; validate these against business objectives (but do not let business objectives override them).
- Break each task into a series of steps the customer needs to perform to complete the job, including the touch points (channels she goes through) on their path to achieving the task.
- Identify which content may be necessary to achieve it; note that you want to look at existing metrics here, and competitive audits can also help.
- Establish key performance indicators and metrics to measure and use that knowledge to make actionable business decisions.

SA: What data do we need to map content to the customer journey?

KN: Quantitative (or hard data) tells you what is happening, but qualitative data is equally important, which provides clues about why something is happening. I suggest collecting and analyzing both:
- *Qualitative data*: user or customer insights, user research, existing journey maps, existing persona or customer profile work, marketing research, user testing
- *Quantitative data*: web analytics, (or including any platform analytics data), social media analytics, data from customer support, sales, CRM data, enterprise search data

SA: How do we know mapping the customer journey is beneficial to the organizations we serve?

KN: We know from all the research out there where others have successfully done it. The key is in rolling it out, and that is where task-based journeys are essential. You can quantify them and measure them.

SA: What should we be doing differently today that we have not been doing in the past?

KN: Ensuring technical communication teams participate in any customer journey work involving content mapping or content decisions — any content that impacts the customer experience. Doing so will show the value of including the technical communication team because customer journey exercises expose the content experience — both bad and good — from the customer's point of view. Consumers do not differentiate between different types of content. They have content needs, but they aren't concerned about who creates the content or what team is responsible for its upkeep.

Generally speaking, consumers want information to help them complete tasks or answer specific questions. Sloppy content experiences reflect poorly on their perception of the brand, not a particular team or individual department inside the organization. There is a lot of technical communication content that impacts the customer experience, so it's vital to be an active and influential part of this process.

SA: What tools are available to help us do journey mapping?

KN: I recently wrote a white paper about journey mapping. It's free to download from my website www.avenuecx.com. It includes step-by-step instructions your readers may find helpful. Additionally, Jim Kalbach just released a new version of his seminal work, *Mapping Experiences,*[1] the textbook version of customer journey maps. Nielsen Norman Group[1] has some terrific introductory tutorials available online. There are journey orchestration tools, but for these types of software to be helpful, you must first produce preliminary journeys and develop adequate customer journey expertise on your team.

SA: Can you provide some advice for our readers. How can they use customer journey mapping to help them showcase their value to the organization?

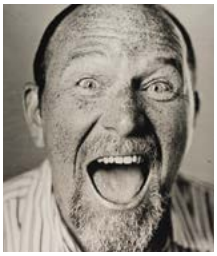
KN: The key is choosing a few high-priority tasks where you feel you could better deliver content overall. Build out journeys around those tasks and then identify the content you need to support it. You will likely discover that you do not have all the content you need, which will require you to create the missing content. To ensure that you can measure success, you'll need to collect metrics that matter. Use data to prove how your efforts impact critical organizational goals, such as increases in sales, customer satisfaction, or customer retention, for example.

SA: You've done a great job of helping us understand the role of customer journey mapping in technical communication content experiences. It's such a big topic we can't cover everything I'd like in this issue of Intercom. Maybe someone should write a book about it (wink, wink). Thanks, Kevin, for sharing your knowledge and experience with our readers. I appreciate you making time to do so.

KN: Technical communication professionals can — and should — work to influence and implement innovative information development approaches that the rest of the enterprise can mimic. I hope this interview helps technical writers better understand the customer journey's role in delivering exceptional content experiences. Thanks for inviting me to share what I've learned with your readers. ■

Reference

1. Kalbach, Jim. 2016. *Mapping Experiences: A Complete Guide to Creating Value Through Journeys, Blueprints, and Diagrams*. Newton, MA: O'Reilly Media Inc.



In the digital age, change happens quickly. This column features interviews with the movers and shakers — the folks behind new ideas, standards, methods, products, and amazing technologies that are changing the way we live and interact in our modern world. Got questions, suggestions, or feedback? Email them to scottabel@mac.com.

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Marketing + Tech Comm for the Win

BY SHAWNEDA CROUT

The practice of separating technical writers from the marketing team outside science, technology, engineering, and mathematics (STEM) industries and the business-to-business sector is over. Product development teams outside of STEM industries are calling for writers with the specialized capacity to inform customers of daily problems they've solved with complex products in language that is simple. Marketing copy for new products, upgrades, and improvements is no longer about "emotional engagement." Business customers and private consumers are not easily fooled by slick presentations or manipulative cues. They're armed with facts, high performing devices, and a limitless library at their fingertips.

Technical writing evolved from microwave instructions and employee support documentation to technical communication over the last few decades. Technical communicators are involved in writing, video creation, script creation, coding, in-app documentation, wireframing, and delivering better user experiences across all industries. Surgeons and rocket scientists are as reliant on technical communication as fitness enthusiasts learning to use their new wearables to improve their endurance.

Content marketing positions are posted as "technical marketing" in many industries previously driven by emotion marketing. Consumer products rely on operating systems, application programming interface (API) connections, and digital devices are involved in everything from ordering food to dyeing hair. Breaking down complex instructions, concepts, and product uses are no longer reserved for companies in STEM industries. Technical specifications, device capacities, and the ability to make the computerized parts of a product work has infiltrated every corner of the nonprofit world, side hustling, and international commerce.

Meeting the Needs of Intelligent Consumers

Today's customers are smart. They're amused or annoyed but not attracted by "clever marketing" tactics. You'll hear how much they're amused or

annoyed by attempts at manipulation if you listen. What they're not tired of is shopping. In fact, online shopping for everything from technical products to consumer solutions has increased for several reasons. These converging factors present a challenge to some and an opportunity to others.

Good marketing takes effort and looks less like the marketing of the past. Manipulative marketing tactics and false claims are easily debunked thanks to social media and review sites. Overreaching claims, altered images, and "clever editing" is unearthed and mocked, much to the chagrin of those business owners more interested in sales than providing solutions.

Intelligent shoppers provide unlimited opportunities for future thinking organizations. Instead of trying to ride out the pixel-driven privacy-piercing ads that dominated the last 10 years, they're investing in solution driven personalized content marketing. From skincare to ERP resources, the importance of presenting solutions to problems is at the forefront of companies who recognize the shift in consumer behaviors regardless of the industry.

Technical communicators involved in the process of creating knowledge base resources, documentation, wikis, and product use videos can consider this a challenge or an opportunity. While some technical products have involved technical writers or technical communicators in the product development phase of a product's lifecycle this is not a "standard practice" across most industries. Using "technical jargon" was frowned upon and making complex things easy to understand was considered part of customer support not promotions. But technical content has become increasingly integrated into the sales cycle.

Embracing the Intersection Between Tech Comm and Marketing

As our daily lives are immersed with more technology, the need to make the complexities of solutions clear in promotional materials is increasing. Whether a company is business-to-consumer, business-to-government, or business-to-business, the need for input from technical communicators in marketing is increasing. For some tech writers this is an affront to the role and responsibilities of product support, for others this is an opportunity to serve customers from discovery to implementation.

Successful companies acknowledge that shoppers have become smarter; embracing the intersection of marketing and technical communication is becoming less of an "opportunity" and more of a requirement. Experienced and emerging technical communication professionals must be open to the value of social media, social search, and "digestible" content that delivers complex information in simple messaging.

As technical communicators recognize and adapt to the changes in communication it creates a sustainable win. Customers win when they feel respected and valued as early as the discovery phase of the marketing journey with a product. Brands win when they can begin earning a customer's trust earlier in their engagement. Consumer trust can increase brand awareness and profit. Individual technical writers win because participating in the content creation earlier in its production in a way that increases revenue will improve their professional reputation and may increase their value to an organization. Embrace marketing intersecting with technical communication for the win. ■

For more information visit:

https://www.forbes.com/sites/forbesbusinesscouncil/2021/05/04/transparency-is-no-longer-an-option-its-a-must/

https://www.business.com/articles/leading-with-transparency/

https://www.emerald.com/insight/content/doi/10.1108/IJCHM-10-2017-0685/full/html

https://blog.hubspot.com/marketing/technical-marketing

SHAWNEDA CROUT (sc@shawneda.com) is a social media manager for Women Who Code and published author. Intersections will explore how technical communication intersects with other disciplines, mediums, and practices

Community and Connections

BY KIRSTY TAYLOR | STC President

One topic I've thought about a lot over the past 18 months is community, and all the forms in which community takes in our lives — coaching a cricket team, being on a basketball team, participating in a spiritual community, family or friends, local historical groups, games groups, gyms, hobby groups, and of course, professional organizations. How the global pandemic has changed where and perhaps when we work, how we spend our time, and how we keep, create, and deepen our professional networks.

For the last 15 years, my primary physical experience of the STC community has been attending the STC Summit. I suspect many of you would be surprised to discover I've never been to an in-person STC chapter meeting — because there were none for my country-wide chapter 20 years ago! (If you'd like to invite me your chapter's virtual meeting, where I can join you remotely, please do.) As a consequence, I feel a strong urge to connect with other members online — it's the easiest way to connect across time zones and locales.

For many of you, your local chapters are likely where you experience the community of STC. As physical gatherings continue to be tricky to negotiate, virtual connections with your STC communities are a way to stay connected with your STC colleagues and friends. In the past year, STC launched a Slack workspace, where members can interact with one another without needing to travel, at a time convenient to you, while tapping into global STC connections across time zones and locales. I've found the Slack a great way to connect, ask questions about Git, share links that I know are interesting primarily to other technical communicators, and share the occasional recipe, knitting project, or pet photo.

I invite you to join us on the STC Slack, if you're not there already. Share your info, tell us what you're working on, ask questions, and get the insights of the STC brains, share chapter events that other members may be able to join remotely, and perhaps even share a picture of your pets!

Do you have any ideas for other ways to virtually connect to STC members, current, past, and future? Or different ways of creating communities in 2021 and beyond? I'd love to hear your ideas! Send me an email or Slack message. ■

KIRSTY TAYLOR (ktaylor.stc@gmail.com) is the 2021-2022 president of STC. Her recurring column will provide updates and insights on Board activities and solicit member feedback to guide ongoing decision-making.

For information on how to join Slack, visit **https://www.stc.org/membership/slack/**

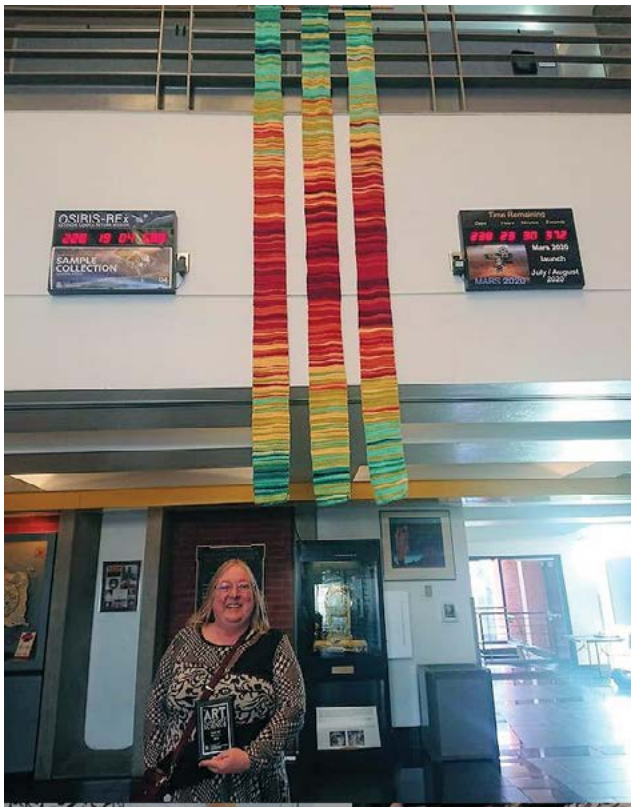
60 New Things

BY BRENDA HUETTNER

Being a technical writer is challenging, diverse, and engaging; it has been fun and lucrative for me. But after 40 years in the industry, I was looking to try something new. But what/where/when/how? Then my sister told me about her plan to try 55 new things before she turned 55. The only rule is that each person gets to decide what counts as new. Does a new flavor of jelly on your toast count? Buying something new instead of doing? Does it count if you don't post on social media? I decided to give it a try, and the #60newthings project began.

My own rules were simple — I wanted the new things to be meaningful to me — that is, bigger than toast. And I wanted to post to social media as a way to keep myself on track and document my progress. I tried a wide variety of things, with varying degrees of success. Note: success was never a criterion for this project, the attempt is enough! Many list items were creative: I painted and crocheted and sewed and cooked. One project won first place at the Art of Planetary Science show (not bad for someone who never thought of herself as an artist). I even tried a 30-day poetry challenge, the only new thing that involved writing.

I started in September 2019, so a lot of my early things involved getting out and meeting new people (highlights included Antoni Porowski, John Waters,



#6 Art of Planetary Science entry and award

#24 Zoom birthday party

and Vint Cerf) or things like walking in my first Pride parade or developing and hosting a monthly "Solar System Sundays" event. But as we all know, everything changed in the early part of 2020, so a lot of the newness became more about new WAYS of doing things. Webinars, conferences, book clubs, even my 60th birthday were all held over Zoom.

I'd say the most successful new things were the ones where I made stuff to give away (hundreds of cloth masks, dozens of preemie hats, quite a few blankets). The least successful was that poetry challenge — writing a poem every day is hard! The most fun things were the one-offs (I fostered a kitten and it was sooo hard to give him up!), I got scanned and made into a green army man, I invented cocktails as guest bartender at an event called "Librations."

The biggest surprise to me was how much I enjoyed being on stage. I participated in a Talk Back session with the play *Silent Sky*, the story of astronomer Henrietta Leavitt. I started singing regularly at a local karaoke bar. And I got a small walk-on role in the movie *Even in Dreams* as "Passerby #1." It was a lot of fun, and it even got me my own IMDb listing!

After trying 60 new things, what did I learn? First, that I'm not that great at deadlines — it took me over a year and half to attempt 60 new things. Secondly, I enjoy being part of lots of different communities (including STC!) But mostly, I learned that I like learning new things. So, for #60 of my #60newthings, I've decided to go back to school and will be applying to the Pima Community College nursing program after I take all the prerequisite classes. Although the #60newthings project is over, being a student again is already providing me with new things almost daily. And who knows, maybe once I'm an RN, I'll be able to contribute to improving medical documentation. ■

 # 53 At the premiere of *Even in Dreams*

You can see more at Brenda's Instagram ***http://instagram.com/bphuettner/*** *or search* ***#60newthings***

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STC Summit Pre-Conference Courses (full day)	6
STC Summit Pre-Conference Courses (half day)	3
STC Annual Summit	8
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Published books publicly available on topics related to *Technical Communication* (5/book)	5
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